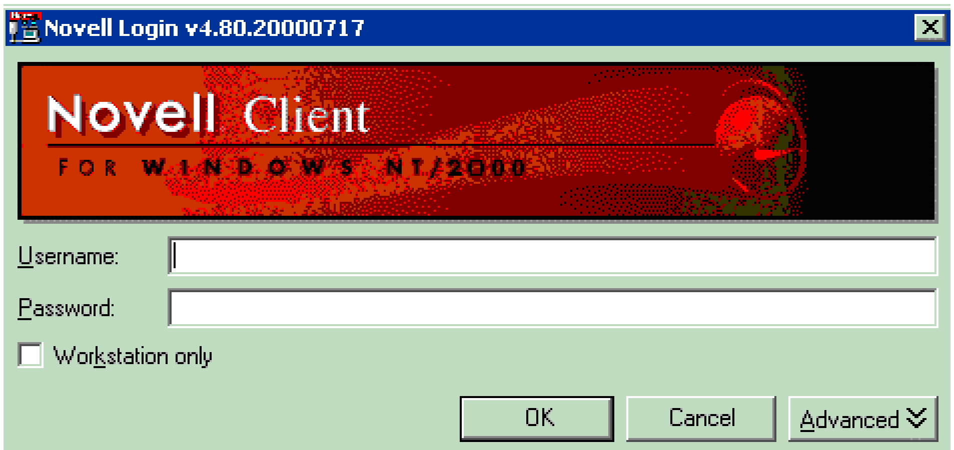
CONREP – Con Update User

Using the CONREP Data System

Table of Contents

Logging into Novell

The Novell Security System offers network capability while providing accelerated network security. The Novell Login both allows appropriate users access to the CONREP data system and protects confidential CONREP patient information.

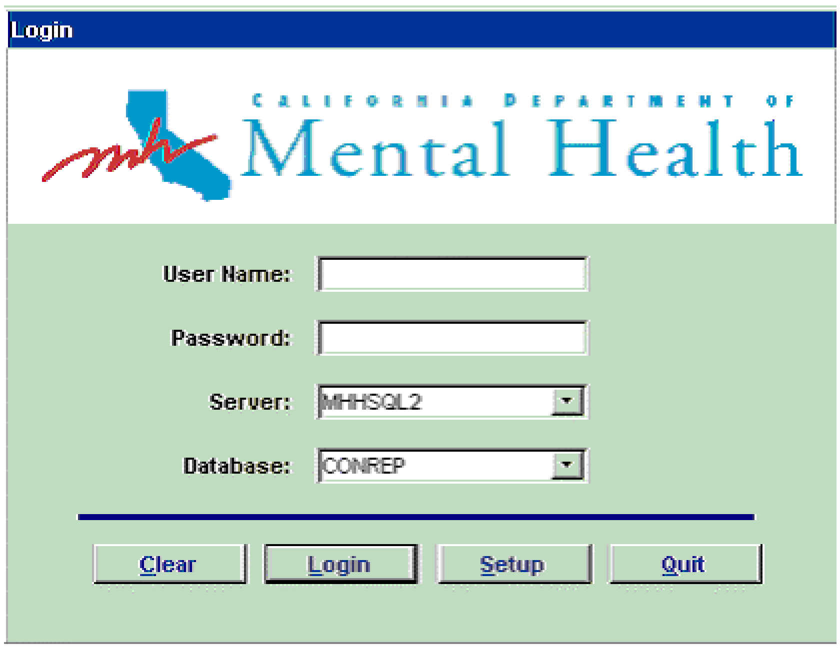


<table>
<tr><th>Step</th><th>Instruction</th><th>System Response</th></tr>
<tr><td>1</td><td>Enter designated user's name in the Username field.</td><td></td></tr>
<tr><td>2</td><td>Enter the appropriate Novell password in the Password field.</td><td></td></tr>
<tr><td>3</td><td>Click on the Workstation only check box.</td><td></td></tr>
<tr><td>4</td><td>Click on the OK button.

Note: Should the system deny access follow system instructions in the pop up boxes to clear up login issue.</td><td>The Novell system will verify that the user has network clearance.
<table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Have clearance</td><td>The system will open the CONREP Data System</td></tr><tr><td>Do not have clearance</td><td>Novel will not allow that user to login.</td></tr></table></td></tr>
</table>

Logging into the CONREP Data System

The CONREP login screen allows eligible users to access the CONREP data system. Since users have various levels of security rights, this login screen insures that each user logging in has the appropriate security clearance.



Step	Instruction	System Response
1	Enter designated user's name in the **User Name** field.	
2	Enter the appropriate System password in the **Password** field.	
3	Select the server in the **Server** drop-down. **Note:** In most instances this field will not be changed as system is set to default to the most current Server/Database.	
4	Select CONREP in the **Database** drop-down. **Note:** In most instances this field will not be changed as system is set to default to the most current Server/Database.	

<table>
<tr><td>5</td><td>Click on the Login button or press Enter.

Note: Should the system deny access follow system instructions in the pop up boxes to clear up login issue.</td><td>The CONREP system will verify that the user has system clearance.

<table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Have clearance</td><td>The system will open the CONREP patient screen.</td></tr><tr><td>Do not have clearance</td><td>The CONREP System will not allow that user to login.</td></tr></table></td></tr>
<tr><td>6</td><td>Click on the Clear button.</td><td>This will clear The User Name and Password fields.</td></tr>
</table>

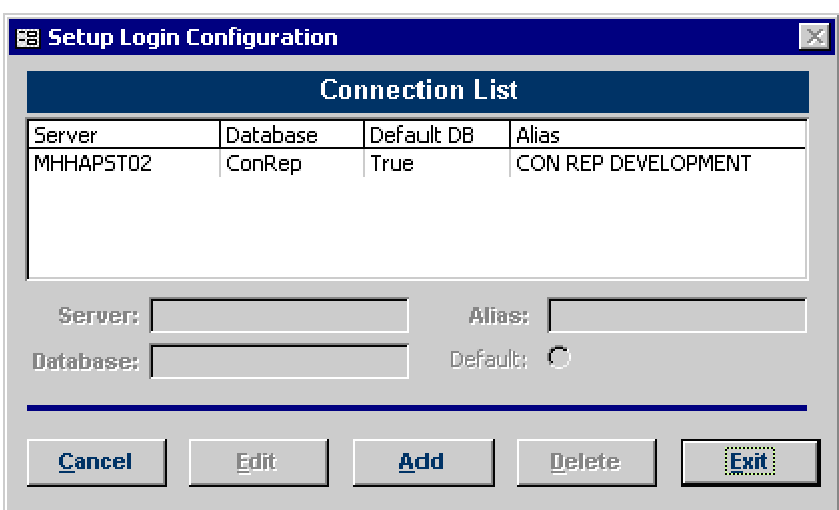
Change Password

The CONREP Data System will allow the user to change their password. Passwords must be changed immediately if compromised. Additionally, as a security precaution, passwords should be changed on average once per month to prevent unauthorized individuals from gaining access to sensitive data. Passwords must be at least 8 characters and one character must be a number.

Step	Instruction	System Response
1	Login to system using the, "**Logging into the CONREP System,"** instructions.	
2	Click on the **Change Password** button.	The system will open the Change Password pop up screen.
3	Enter new password in the field **New Password**.	
4	Retype password in the field **Verify New Password**.	
5	Hit the **Tab** key.	The System will enable the Change button.
6	Click on the **Change Password** button.	The system will update the login password to reflect the newly entered password.
7	Click on the **Clear** button.	The system will clear the two password fields.

Set Up New Server Connection

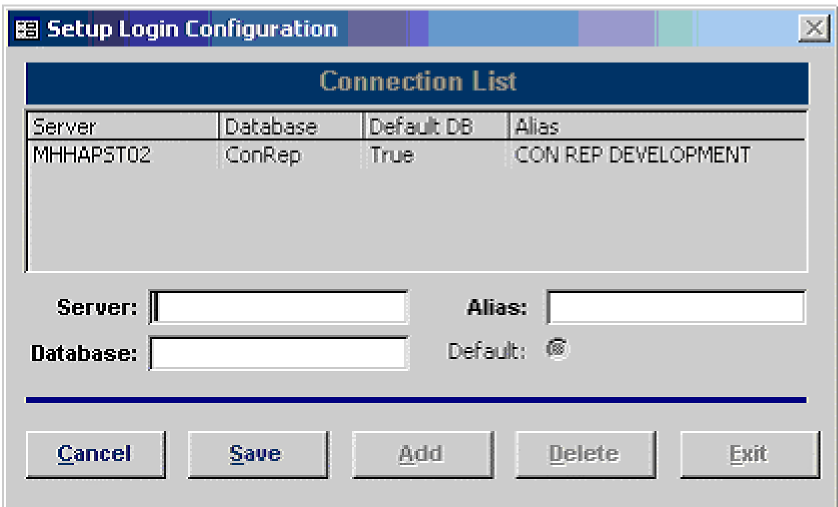
The CONREP Data System will allow the user to make new connections to servers or switch from one server connection to another. A change in server connection would occur **only** if DMH switched to an alternate server or added a new server. Users are cautioned not to change server connections unless and until DMH notifies of such change.



Step	Instruction	System Response
1	Click on a server name from the **List Box**.	The system will select the chosen server.
2	Click on the **Exit** button.	The system will bring user back to the login screen.

Add a New Server Connection

The CONREP Data System will allow the user to add a server connection to the system connection list. Users are cautioned not to add new server connections unless and until DMH notifies of such change.

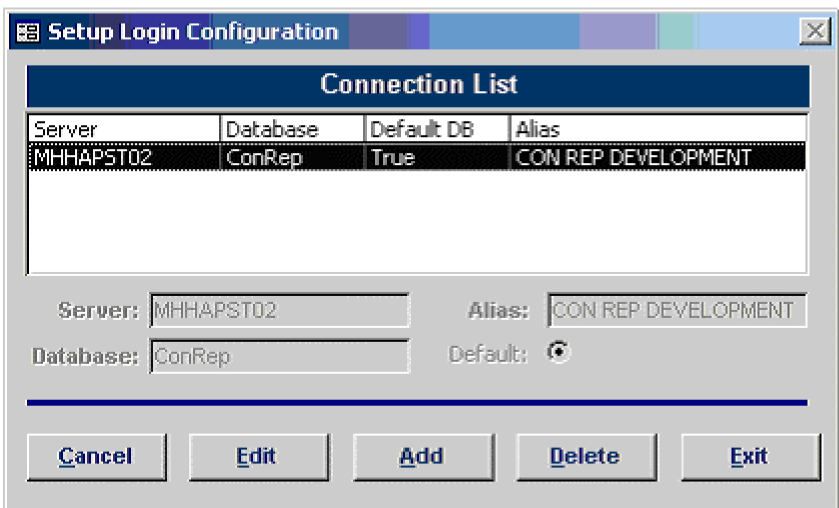


Step	Instruction	System Response
1	Click on **Setup** in the Login Screen.	The system will display the Setup Login Configuration Screen.
2	Click on the **Add** button.	The system will disable the Connection list and enable the Server, Database, Alias and Default fields.
3	Enter the new server name in the **Server** field.	
4	Enter the database name in the **Database** field.	
5	Enter the database alias in the **Alias** field.	

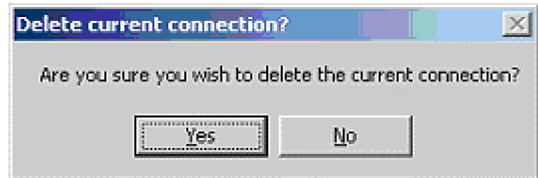
6	Select the **Default** radio button**.**	
7	Click on the **Save** button. **Note:** When the default radio button is selected, the server/database conditions that were saved are now defaulted in the login screen.	The system will update and save all new conditions entered by the user.

Delete a Server Connection

The CONREP Data System will allow the user to delete obsolete or unused servers from the system connection list. Users are cautioned not to delete server connections unless and until DMH notifies of such change.



Step	Instruction	System Response
1	Click on **Setup** in the Login Screen.	The system will display the Setup Login Configuration Screen.
2	Select the server to be deleted from the List box.	The system will enable the delete button.

3	Click the **Delete** button.	The system will enable a warning message box:  **Note:** If a connection is deleted the user must recreate that connection by following instructions in the Add New Server Connection Section.
4	Click the **Yes** button.	The system will delete the server connection.

Logging off the CONREP Data System

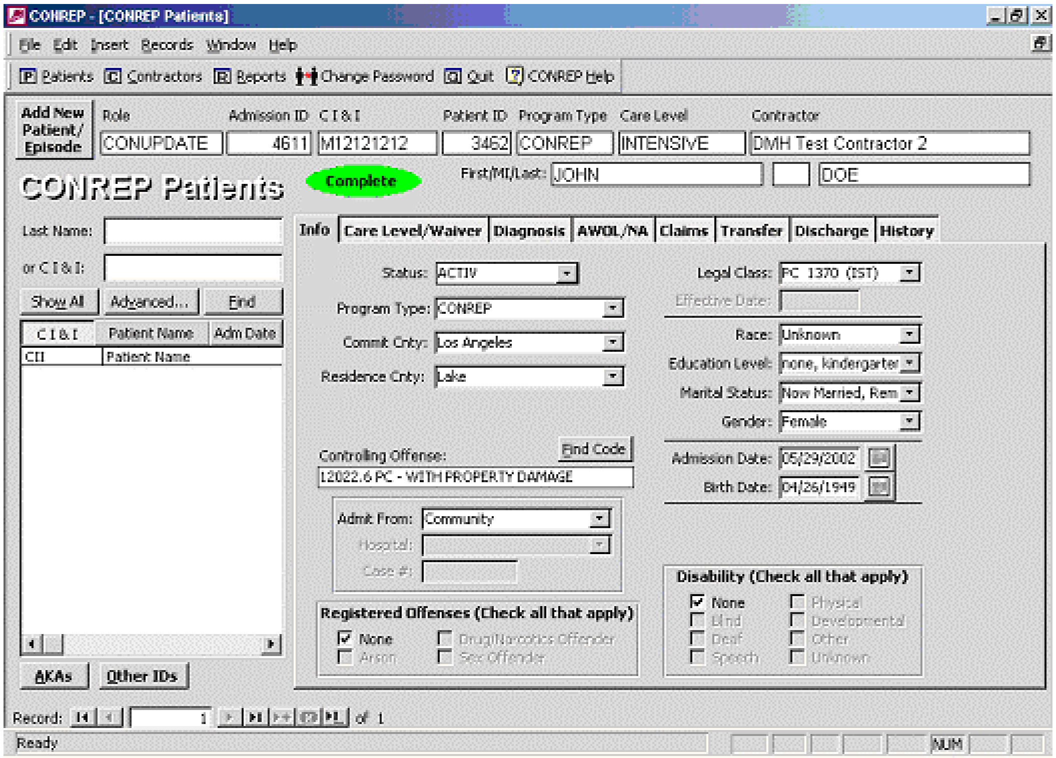
Users must always click on the **Quit** Button on the menu bar to log off the CONREP data System. The Quit function allows the user to log off the database as well as the network server and allows the database to effectively shut itself down.

Clicking the “**X**” on the right hand corner of the data system screen will log the user off the database but not the network server, which will result in unnecessary server traffic.

Patient Information/Episode Information

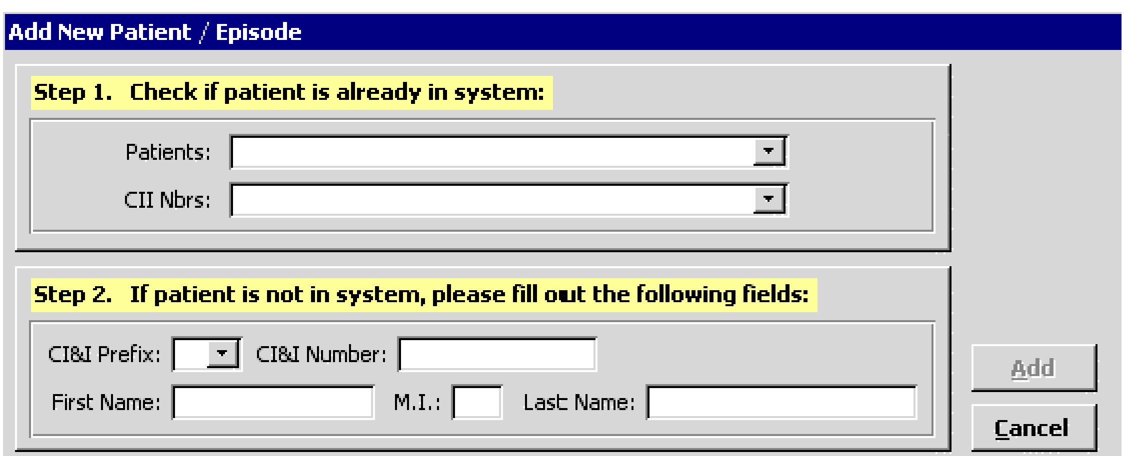
The purpose of the Patient Screen is to track movement of CONREP patients to allow for monitoring of core service compliance and to meet Department of Justice patient status reporting requirements. CONREP Providers are required to submit patient admission, discharge, or change in patient status (i.e., AWOL, NA, Transfer) information within three business days of such occurrence.

To make a patient record complete/active the demographic fields must be completed in the Info and Care Level screens. When a record is complete, the Record Indicator will display a green indicator stating “Complete”.



Add New Patient/Episode

All patient admissions to the Conditional Release Program must be entered in the CONREP Data System. Prior to adding a patient admission, the user must first check whether or not a patient was previously in CONREP. If the patient has never been in CONREP, the user would complete an "Add New Patient" transaction. If the patient was previously in CONREP, the user would then complete a "New Episode" transaction.



<table>
<tr><th>Step</th><th>Instruction</th><th>System Response</th></tr>
<tr><td>1</td><td>Click on the Add New Patient/ Episode Button.</td><td>The Add New Patient/Episode screen appears.</td></tr>
<tr><td>2</td><td>Go to step one and check both the Patients and CII Nbrs drop-down boxes to determine type of admission.
<table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td rowspan="3">Patient’s name or CII # appears on the drop-down box</td><td>Patient has previously enrolled in the system</td></tr>
<tr><td>Select patient record and verify name/CII#/ DOB</td></tr>
<tr><td>Skip to Step 5</td></tr>
<tr><td rowspan="2">Patient’s name or CII # DOES NOT appear on the drop-down box</td><td>Patient has not previously enrolled in the system</td></tr>
<tr><td>Go to Step 3</td></tr>
</table></td><td></td></tr>
<tr><td>3</td><td>If the patient was not previously enrolled in the system, complete all fields in Step 2 in the Add New Patient/Episode Screen.</td><td></td></tr>
<tr><td>4</td><td>Hit the Tab key.</td><td>The system will enable the Add button.</td></tr>
<tr><td>5</td><td>Click on the Add button.</td><td>The System will create a new admission record and Admission ID. (If new patient admission, the system will create a new Patient ID.) The patient status is automatically updated to Pending and the Record Indicator will state “Incomplete”.</td></tr>
</table>

<table>
<tr><td>6</td><td>Use the drop-down boxes to complete the following fields:

Program Type
Commit Cnty (Commitment County)
Residence Cnty (Residence County)
Race
Education Level
Marital Status
Gender

Note: After the record is complete, the Status field is auto-filled by the system to reflect the patient status. (In this instance it will show an “active” status)</td><td></td></tr>
<tr><td>7</td><td>Click on the Find Code button to locate the Controlling Offense.</td><td>The system will enable the Advanced Search screen. (See Advanced Search for further information.)</td></tr>
<tr><td>8</td><td>Click on the first field drop down and select Penal Code.</td><td>The system will default to “Contains Item” in the second field drop down.</td></tr>
<tr><td>9</td><td>Type in one or more digits of the desired Penal Code in the third field drop down and tab.</td><td>The system will default to “And” in the fourth drop down.</td></tr>
<tr><td>10</td><td>Click on the Add button</td><td>The system will display the selected Penal Code information in the Criteria box.</td></tr>
<tr><td>11</td><td>Click on the Search button</td><td>The system will display all Penal Codes matching the selected criteria.</td></tr>
<tr><td>12</td><td><table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Click on Detail</td><td>The system will add the selected Penal Code to the Info Screen</td></tr><tr><td>Click on Exit</td><td>The system will not update the Penal Code</td></tr></table></td><td></td></tr>
</table>

<table>
<tr><td>13</td><td>Admit From
Use the drop-down box to select the location from which the patient was admitted

<table><tr><th>If you select…</th><th>Then…</th></tr><tr><td>Community</td><td>Skip to step 15</td></tr><tr><td>Hospital</td><td>Go to step 14</td></tr><tr><td>IMD</td><td>Skip to step15</td></tr><tr><td>Unknown</td><td>Skip to step 15</td></tr></table></td><td></td></tr>
<tr><td>14</td><td>Hospital
Select the correct hospital from the drop-down list.</td><td></td></tr>
<tr><td>15</td><td>Case #
Enter the most recent 6-digit Hospital Case number.</td><td></td></tr>
<tr><td>16</td><td>Use the drop-down box to select the legal class.

<table><tr><th>If you select…</th><th>Then…</th></tr><tr><td>PC 2972</td><td>Enter the effective date</td></tr></table></td><td></td></tr>
<tr><td>17</td><td>Complete the Admission Date and Birth Date in the corresponding fields.

Note: Enter dates in mm/dd/yyyy format.</td><td></td></tr>
<tr><td>18</td><td>Check applicable fields in Registered Offenses and Disability boxes.

Note: You must check None if no fields apply.</td><td></td></tr>
<tr><td>19</td><td>Click on the Care Level tab and add the patient’s Care Level.

Note: See Care Level for further information.</td><td>Patient Status is automatically updated to Active and the Record Indicator will state “Complete”.</td></tr>
<tr><td>20</td><td>Click on the Diagnosis tab and add the patient’s Diagnosis.

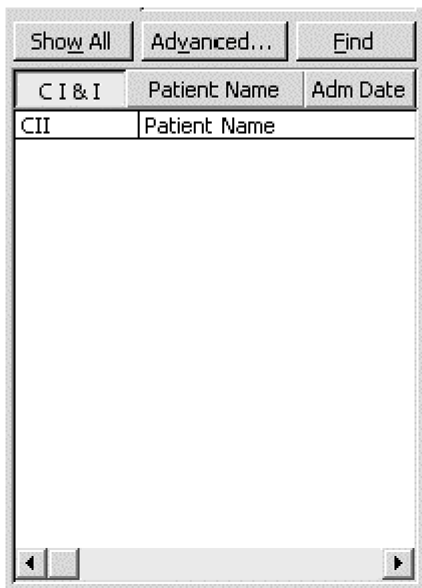
Note: See Diagnosis for further information.</td><td></td></tr>
</table>

Search/View Patient Records

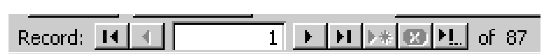
The CONREP Data System provides the user with a variety of ways to search for and view patient records specific to their program. The Data System search engine allows the user to both search for individual patient records as well as search for patient records that fit specified criteria.

Basic Search

A basic search allows the user to search for patient information either by patient's last name or CI&I number. A user may only search for patients enrolled in their program.



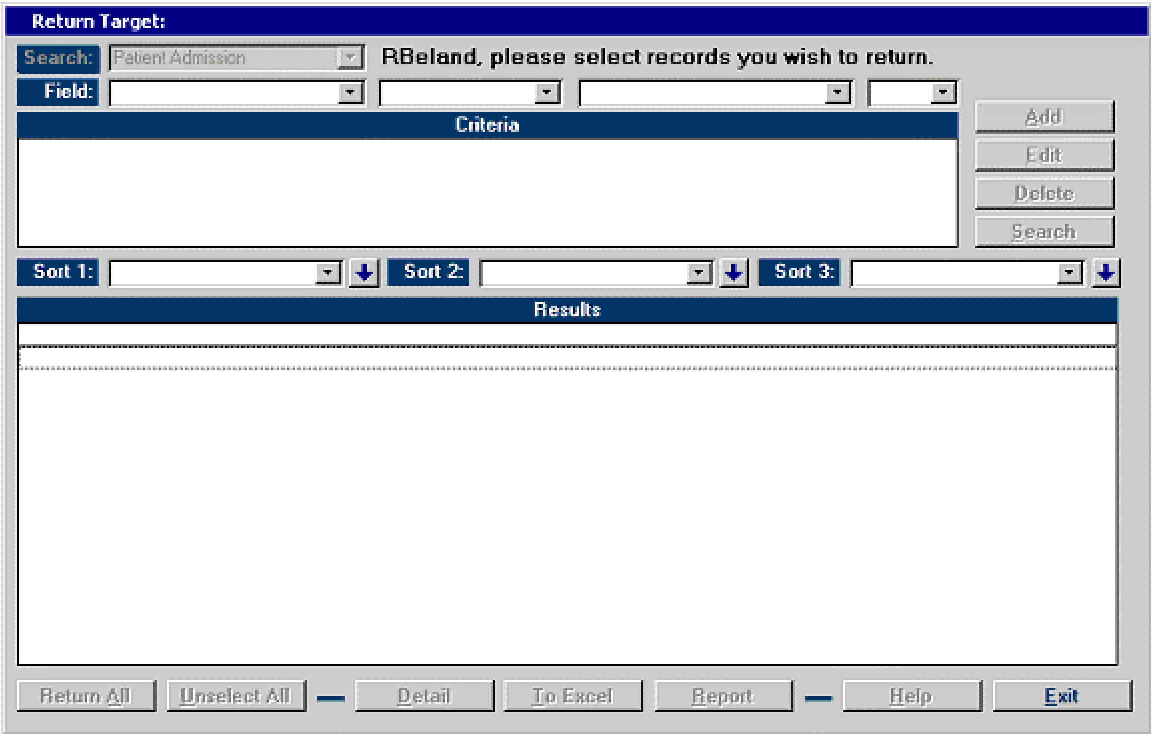
Step	Instruction	System Response
1	Enter either the patient's last name or CI&I number. **Note:** A partial last name or CI&I number may be entered when performing a search.	

2	Click on the **Find** button. **Note:** Scroll to the right on the patient return screen to see further information on a specific patient record.	The System will locate all patient names that match the typed criteria. If there are no matches to the criteria the following message box will pop up: 
3	Click on column header.  	The System will sort by the header categories in ascending order. **Note:** System will sort by only one category at a time.
4	Select patient record.	The system will display patient information. **Note:** System filter will allow the selected patient record to be viewed.
5	Click **Show All**.	The system will clear search filter and Records Navigator will allow access to all patient records. 

Advanced Search

The Advanced Search provides for flexibility in searching patient records. The criteria values vary and are specific to the screen from which the search is performed. For example search criteria such as care level, and admission date are available when performing an advanced search from the Info tab.

Additionally, the Advanced Search provides a number of parameters to assist users in tailoring a search, such as “contains item”, “doesn’t contain item” and “starts with”. Both criteria selection and parameters assist in locating records which match user specifications. A user may only search for patients enrolled in their program.



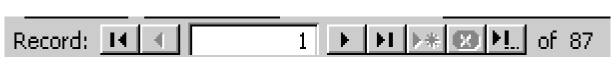
Step	Instruction	System Response
1	Select criteria from the **Field** drop-down. **Note:** Criteria selection is dependent upon screen from which search is performed.	
2	Tab to the next drop-down	
3	Tab to the next field.	
4	Enter a **value**.	
5	Tab to the next drop-down.	

<table>
<tr><td>6</td><td>Make a selection from the drop-down.
<table><tr><th>If you select…</th><th>Then…</th></tr><tr><td>And</td><td>The system assumes you may have more than one criteria that will be added to the criteria list box.</td></tr><tr><td>Or</td><td>The system assumes you may have one or another criteria that will be added to the criteria list box.</td></tr></table></td><td></td></tr>
<tr><td>7</td><td>Click on the Add button.</td><td>The system will add the criteria to the criteria list.</td></tr>
<tr><td>8</td><td><table><tr><th>If …</th><th>Then…</th></tr><tr><td>That is the only criteria</td><td>Go to step 9</td></tr><tr><td>There are more criteria</td><td>Go to step 1</td></tr></table></td><td></td></tr>
<tr><td>9</td><td>Click on the Search button.</td><td>The system will search records to find all matches with the specified criteria.</td></tr>
<tr><td>10</td><td><table><tr><th>If …</th><th>Then…</th></tr><tr><td>The system reports no records were found with the criteria.</td><td>Go to step 12</td></tr><tr><td>If the system reports record(s) in the return screen.</td><td>Go to step 15</td></tr></table></td><td>The system will sort in ascending order by the parameter selected.</td></tr>
</table>

<table>
<tr><td>11</td><td>Click on a criteria.
<table><tr><th>Click on the…</th><th>Then…</th></tr><tr><td>Edit button if the criteria needs to be edited</td><td>Go to step 13.</td></tr><tr><td>Delete button if the criteria needs to be deleted</td><td>Go to step 1.</td></tr></table></td><td></td></tr>
<tr><td>12</td><td>Enter the correct data in the search criteria fields by following steps 1-10.</td><td></td></tr>
<tr><td>13</td><td>Select a parameter from the Sort drop-downs.</td><td>The system will sort in ascending order by the parameter selected.</td></tr>
<tr><td>14</td><td>Select pertinent records.</td><td>The records will be highlighted blue.</td></tr>
<tr><td>15</td><td><table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Click on Details button</td><td>The system will filter those records to the patient screen where user can view details of those selected records.</td></tr><tr><td>Click on Excel button</td><td>The system will open and filter those selected records to an Excel document.</td></tr></table></td><td></td></tr>
</table>

Scroll for Records

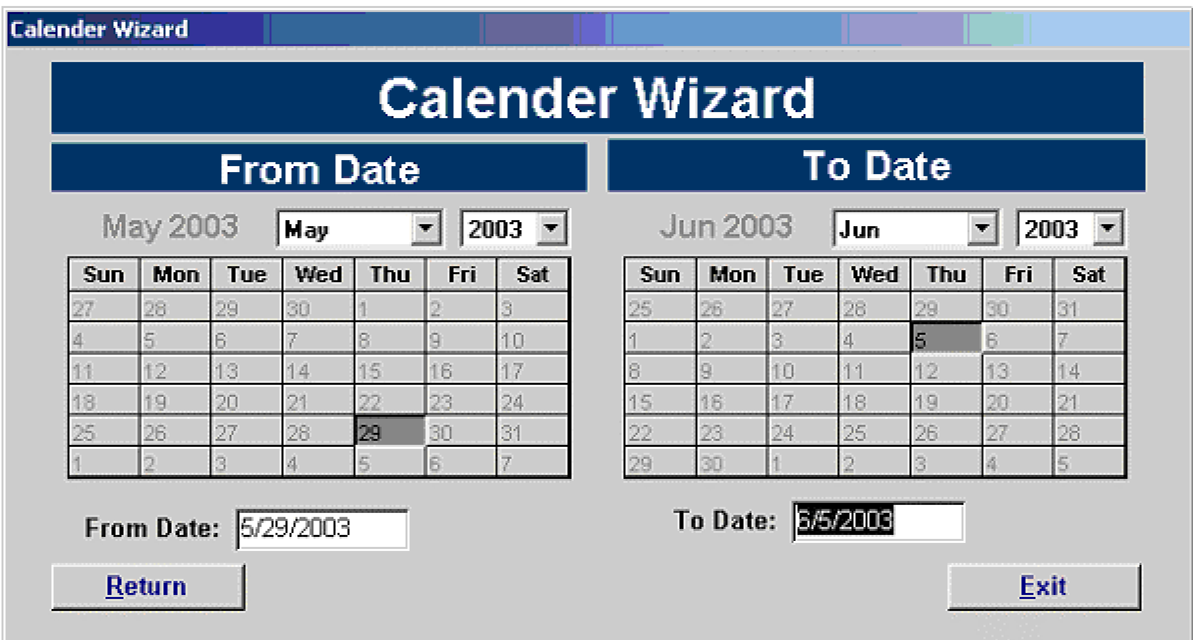
The record navigator allows the user to manually scroll through the individual records of patients enrolled in their program.



Step	Instruction	System Response
1	Click navigation button	The system moves forward one patient record at a time.
2	Click navigation button	The system moves to the last patient record.
3	Click navigation button	The system moves back one patient record at a time.
4	Click navigation button	The system moves to the first record.

Calendar Wizard

The Calendar Wizard is a tool wherein the user can view and choose dates in a calendar format when entering various patient and contractor transactions. The Calendar Wizard defaults to the current month but will allow the user to choose dates from previous months.

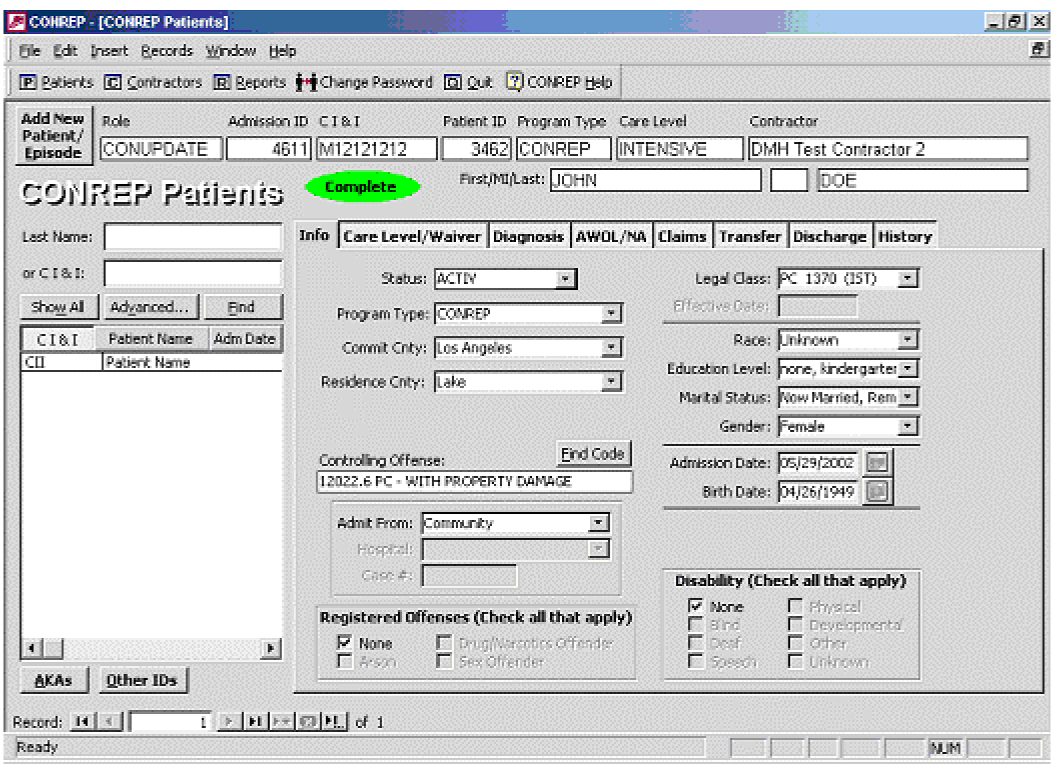


Step	Instruction	System Response
1	Double Click on the desired date on the **From Date** section on the Calendar.	The system will update the From Date at the bottom of the Calendar Wizard with the selected date.

2	Double Click on the desired date on the **To Date** section on the Calendar.	The system will update the To Date at the bottom of the Calendar Wizard with the selected date.
3	Click on the **Return** button.	The system will update the corresponding date fields as well as close down the Calendar Wizard.

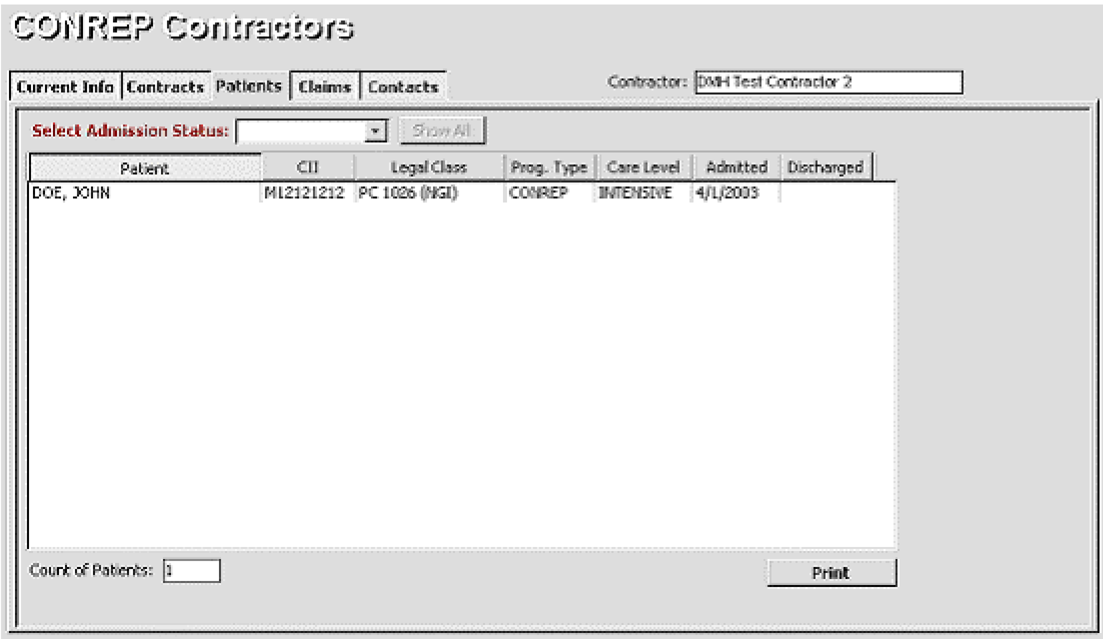
Edit Patient Records

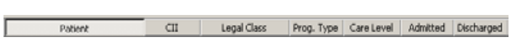
Patient records in the Info tab should be updated to reflect demographic changes as they occur. Patient records may be edited as long as the patient's status is Active (i.e., Active, AWOL, NA). All fields are available for edit except the Status field, which is automatically updated by the system. If checked, the None check box must be unchecked before updating Registered Offenses and/or Disability information.



View/Print Patient List

The system allows the user to view and/or print patient lists while in the Patients tab of the Contractors screen. The Patients tab defaults to a list of the CONREP Provider's historical patients and also allows the user to search for patients based on their admission status. Users may only view and/or print patient lists for patients enrolled in their program.

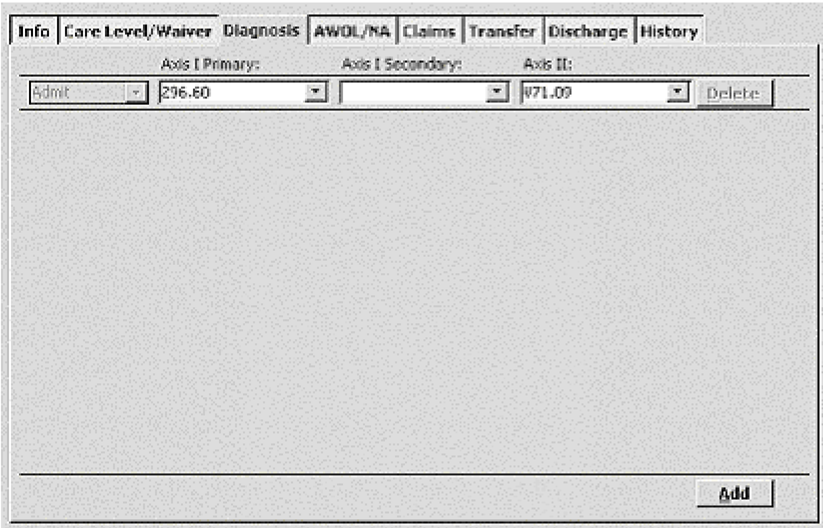


Step	Instruction	System Response
1	Click on the **Contractor** button.	The system will display the Contractor screen.
2	Select the **Patients** tab.	The system will display all patient names specific to program.
3	Click on **Select Admission Status** drop down.	The system allows user to select criteria for a patient search.
4	Click on column header. 	The system will sort by the header categories in ascending order. **Note:** System will sort by only one category at a time.

5	Click on the **Print** button.	The system will print a report of all patients displayed on the screen.
6	Click on the **Show All** button.	The system will clear the search filter.

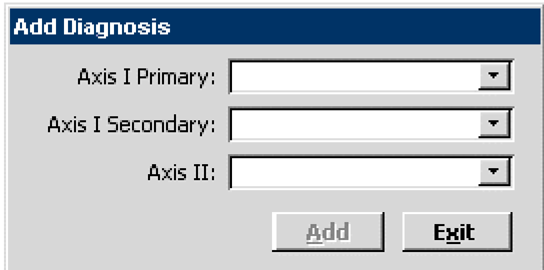
Diagnosis

A diagnosis is a label applied to a patient by a physician or mental health professional after confirming the presence of those symptoms and/or behaviors that define the psychiatric disorder. Every CONREP patient will have, at minimum, an Axis I Primary diagnosis, which must be reflected in the Diagnosis tab of the Patients screen.



Add a New Diagnosis

Upon admission, or as soon as known, patient diagnosis information must be entered in the Diagnosis tab. Users must enter an Axis I Primary diagnosis, however a patient may or may not have an Axis I Secondary and/or Axis II diagnosis. Discharge diagnosis information will be added in the Discharge tab rather that the diagnosis tab (see Discharging a Patient for further information).



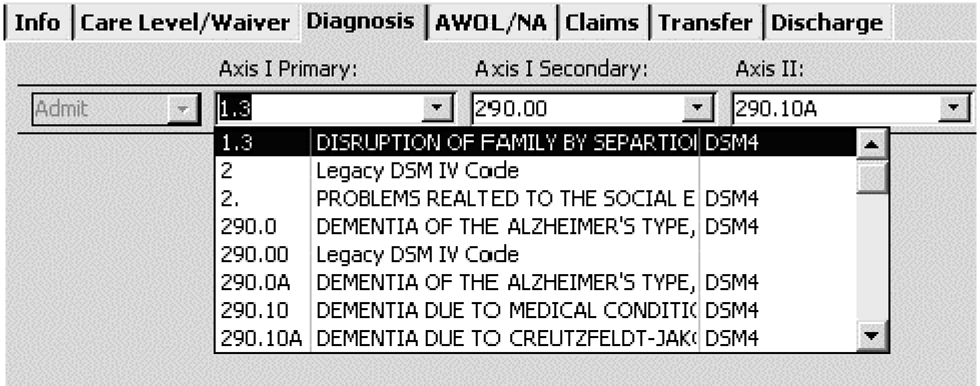
Step	Instruction	System Response
1	Click on the **Add** button.	The system will display the Add Diagnosis screen.
2	Select or type in the **Axis I Primary** drop-down.	The system will allow the user to find the desired diagnosis. **Note:** Axis I Primary diagnosis must be entered.
3	Select or type in the **Axis I Secondary** drop-down.	The system will allow the user to find the desired diagnosis.
4	Select or type in the **Axis II** drop-down.	The system will allow the user to find the desired diagnosis.

View Diagnosis

The system allows the user to view current diagnosis information by first locating the patient record to be viewed and then clicking on the Diagnosis tab for the selected patient. Users may only view Diagnosis information for patients enrolled in their program.

Edit an Existing Diagnosis

The system allows the user to edit incorrect diagnosis information by first locating the patient record to be edited and then clicking on the Diagnosis tab for the selected patient. If a second diagnosis is added in error, contact CONREP Operations for further assistance.

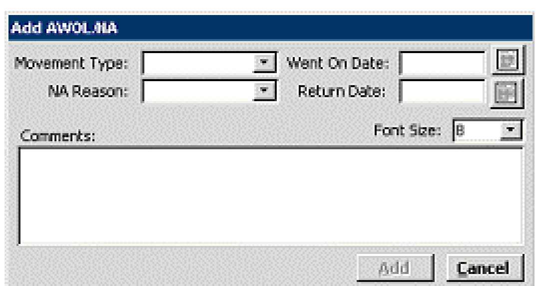


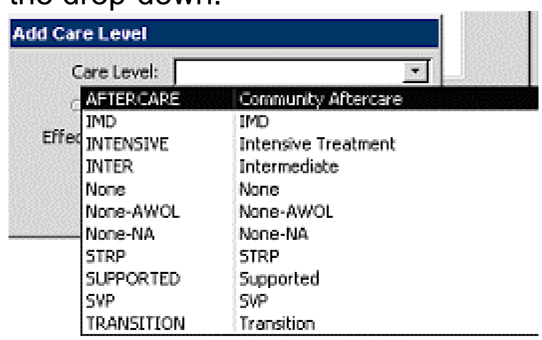
AWOL/NA (Movement)

Whenever a patient is determined to be AWOL (absent without leave) or becomes NA (not available), CONREP Providers are required to submit this status change within three business days of such occurrence. (A patient is defined as AWOL when he/she is not receiving treatment or supervision as ordered by the court. A patient is NA when incarcerated or hospitalized for medical or psychiatric reasons.)

Placing a Patient on AWOL or NA Status

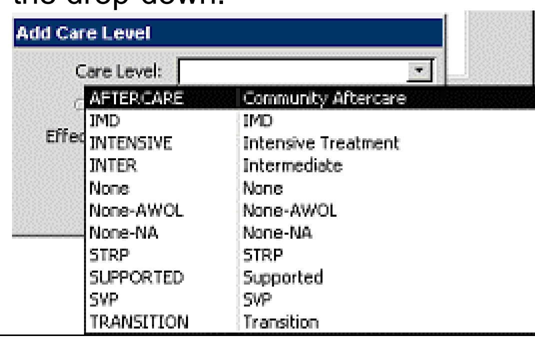
AWOL or NA status information must be entered in the CONREP Data System each time a patient becomes AWOL or NA from a CONREP Program. The system allows the user to add AWOL or NA information by first locating the patient record and then clicking on the AWOL/NA tab for the selected patient.



<table>
<tr><th>Step</th><th>Instruction</th><th>System Response</th></tr>
<tr><td>1</td><td>Select the patient record.</td><td>The system will display the patient’s record.</td></tr>
<tr><td>2</td><td><table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Add an AWOL</td><td>Go to step 3</td></tr><tr><td>Add an NA</td><td>Skip to step 16</td></tr></table></td><td></td></tr>
<tr><td>3</td><td>Select the Care Level/Waiver tab.</td><td>The system will display the Care Level screen for the patient’s record.</td></tr>
<tr><td>4</td><td>Click on the Add New Care Level button.</td><td>Add Care Level pop up screen will appear.</td></tr>
<tr><td>5</td><td>Select None-AWOL from the Care Level drop-down.</td><td>The system will add that selection to the drop-down.

</td></tr>
<tr><td>6</td><td>Enter the Effective date and hit the Tab key.

Note: The effective date is the same as the AWOL date.</td><td>The system will enable the Add button.</td></tr>
<tr><td>7</td><td>Click on the Add button.</td><td>The patient record is updated.</td></tr>
<tr><td>8</td><td>Select the AWOL/NA tab.</td><td>The system will show the AWOL/NA screen for the patients record.</td></tr>
<tr><td>9</td><td>Click on the Add AWOL/NA button.</td><td>The Add AWOL/NA pop up screen appears.</td></tr>
<tr><td>10</td><td>Select AWOL from the Movement Type drop-down box.</td><td>The Movement Type will be updated and the NA Reason Drop down is disabled.</td></tr>
<tr><td>11</td><td>Click on the Calendar button or type in the date for the Went on Date field.

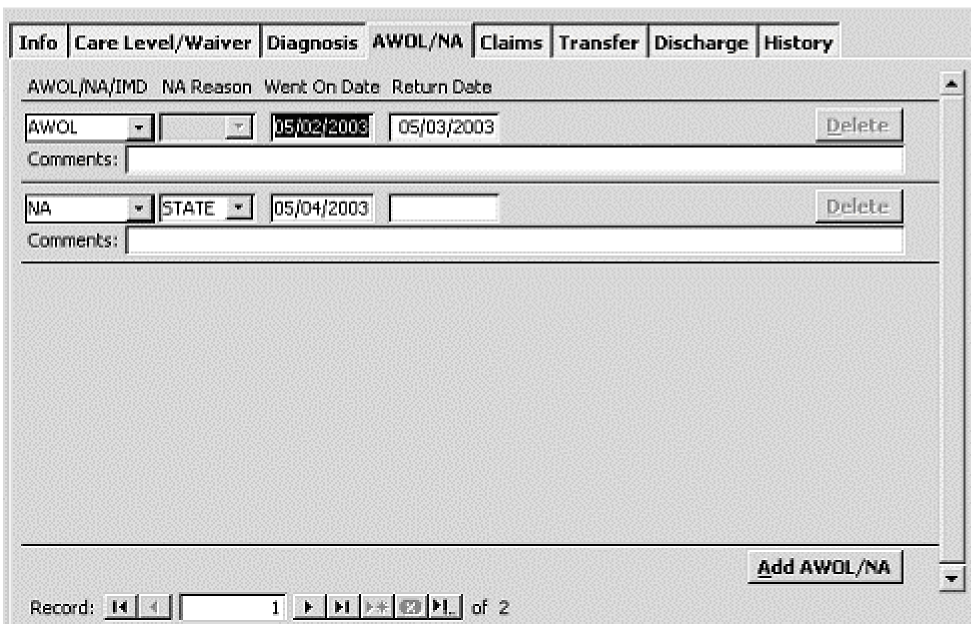
Note: See the Calendar Wizard section for further information.</td><td></td></tr>
</table>

12	Enter status of legal proceedings and other relevant information in the **Comments** field.	
13	Click on the **Add** button.	The system will update the patient's record.
14	Select the **Care Level/Waiver** tab.	The system displays the Care Level screen for the patient's record.
15	Click on the **Add Care Level** button.	The Add Care Level pop up screen will appear.
16	Select **None-NA** from the Care Level drop-down.	The system will add that selection to the drop-down. 
17	Enter the Effective date and hit the **Tab** key. **Note:** The effective date is the same as the AWOL date.	The system will enable the Add button.
18	Click on the **Add** button.	The patient Care Level is updated.
19	Select the **AWOL/NA** tab.	The system will display the AWOL/NA screen for the patient's record.
20	Click on the **Add AWOL/NA** button.	The Add AWOL/NA pop up screen will appear.
21	Select **NA** from the **Movement Type** drop-down box.	The NA Reason Drop down becomes enabled.
22	Make a selection from the **NA Reason** drop-down	
23	Click on the Calendar button or type in the date for the **Went on Date** field. **Note:** See the Calendar Wizard section for further information.	

24	Enter the status of legal proceedings and other relevant information in the **Comments** field.	
25	Click on the **Add** button.	The system will update the patient's record.

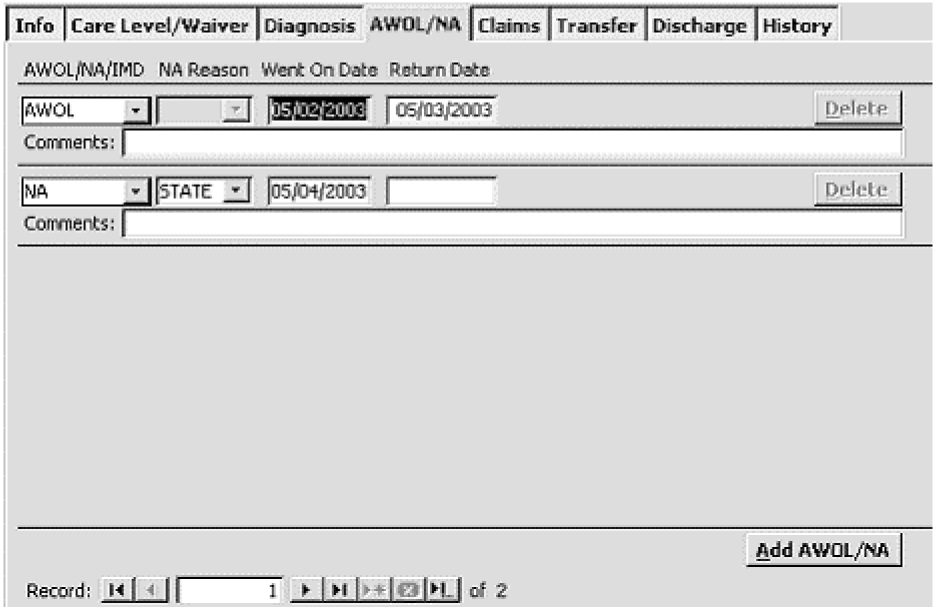
Viewing an AWOL/NA Status Record

The system allows the user to view AWOL and NA information by first locating the patient record to be viewed and then clicking on the AWOL/NA tab for the selected patient. Users may only view AWOL/NA information for patients enrolled in their program.



Edit an AWOL/NA Status Record

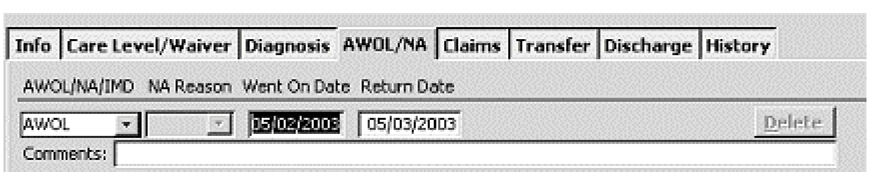
The system allows the user to edit AWOL/NA information by first locating the patient record to be edited and then clicking on the AWOL/NA tab for the selected patient. If a patient is placed on AWOL/NA status in error, contact CONREP Operations for further assistance.



Step	Instruction	System Response
1	Click on the desired field.	
2	Make changes to **Movement Type**, **Dates** or **Comments** as necessary.	The system will update the record.

Returning a Patient to Active Status

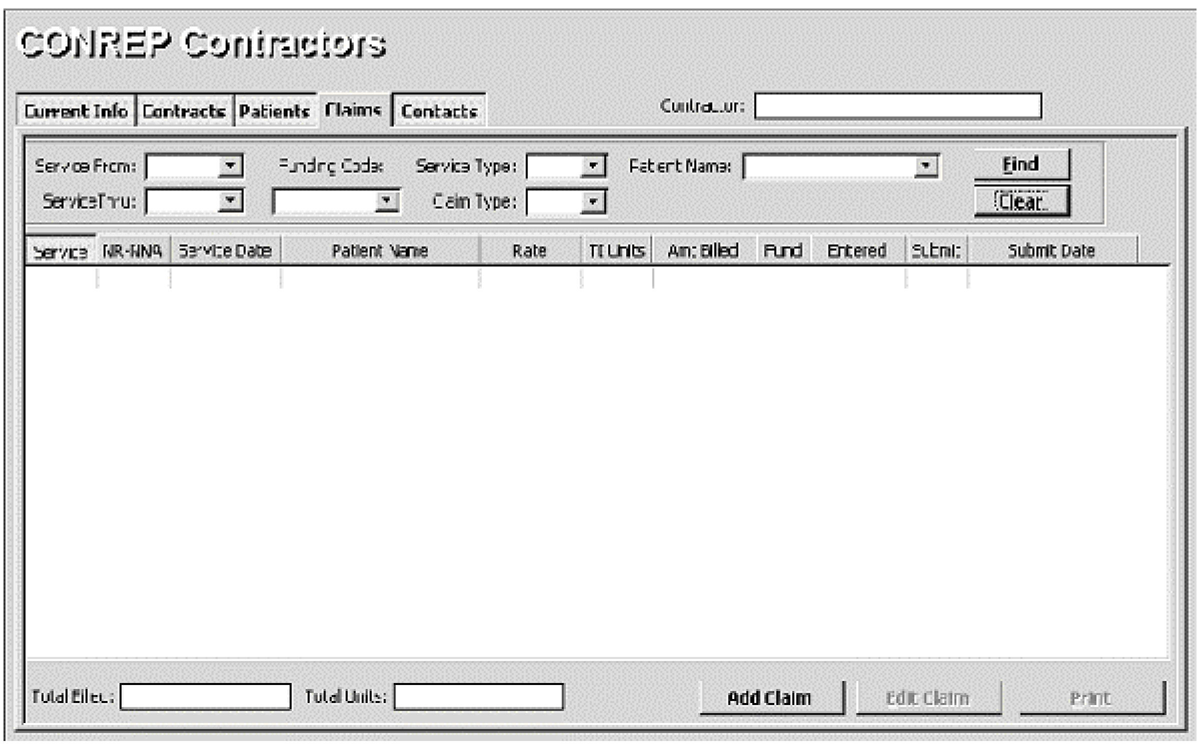
The patient record must be updated to reflect his/her return to the CONREP Program from AWOL or NA status. The system allows the user to return a patient from AWOL or NA by first locating the patient record and then clicking on the AWOL/NA tab for the selected patient.



Step	Instruction	System Response
1	Select **patient record**.	
2	Select **AWOL/NA** tab.	The system will display AWOL/NA record.
3	Type the patient's return date in the **Return** field.	The system will update record to reflect Active status.
4	Select **Care Level/Waiver** tab.	The system will display the Care Level/Waiver screen.
5	Click on the **Add a Care Level** button **Note:** See Care Level for further information.	Patient's Care Level will be updated.

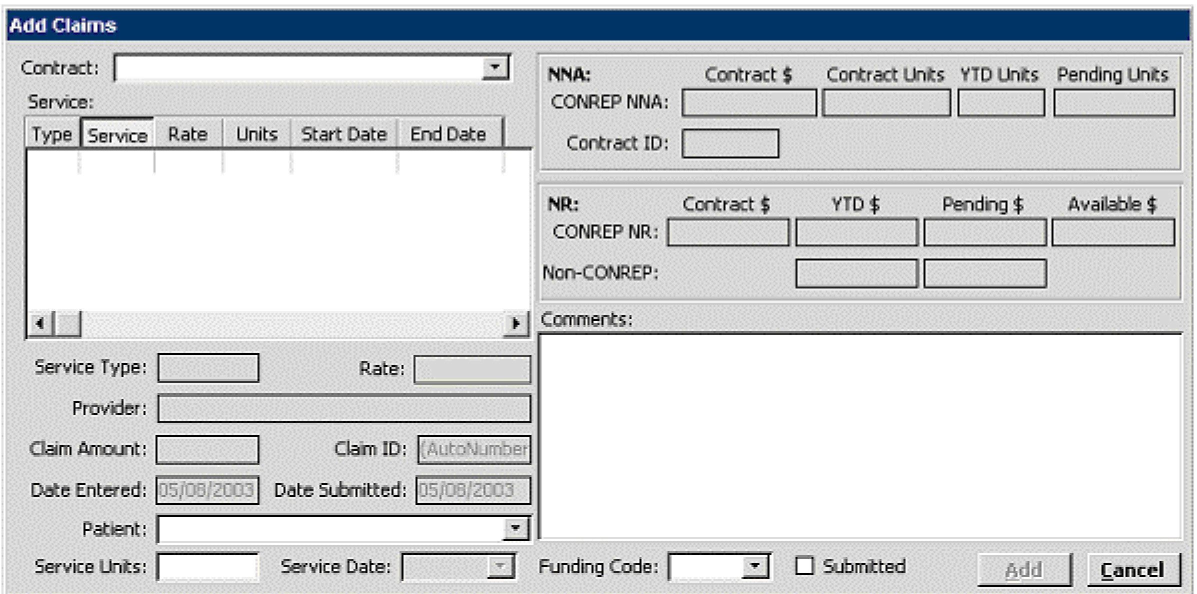
Claims

The function of the Claim screen is to allow providers to submit Negotiated Net Amount (NNA)/Core Service and Negotiated Rate (NR) claim data for contract monitoring and payment purposes. CONREP Providers are to report all services provided to patients, including those services not funded under contract.



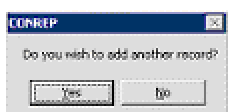
Add New Claims

NNA/Core Service and NR claims must be entered on a monthly basis by the 15th of the month following the month of service. The system allows the user to add new and corrected claims for the existing Fiscal Year (FY) and prior two FY's.



Step	Instruction	System Response
1	Click on the **Contractor** button.	The system will display the Contractor Screen.
2	Select the **Claims** tab.	The system will display the Claims screen.
3	Click on the **Add Claims** button	The Add Claims pop up screen will appear.
4	Select the fiscal year (FY) from the **Contract** drop-down.	The system will display all the contract services related to the selected Fiscal Year (FY).
5	Select Service Type from the **Service** List box.	

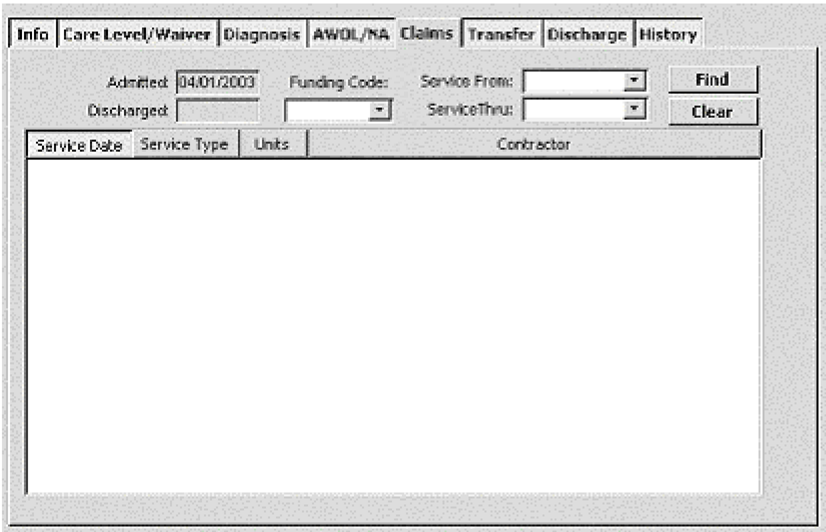
<table>
<tr><td>6</td><td>Select a patient name from the Patient drop-down and Tab to the next field.

Note: User can quickly locate patient name by typing in one or more letters of the patient’s last name in the Patient drop-down field.</td><td></td></tr>
<tr><td>7</td><td>Enter the number of units in the Service Units field and Tab to the next field.</td><td></td></tr>
<tr><td>8</td><td>Select a service month from the Service Date drop-down and Tab to the next field.</td><td></td></tr>
<tr><td>9</td><td>Select the funding code from the Funding Code drop-down and Tab.</td><td>The system will enable the Add button.</td></tr>
<tr><td>10</td><td><table>
<tr><th>If you …</th><th>Then…</th></tr>
<tr><td>Click on the Add button.</td><td>The system saves claim and a pop up asks if you want to add another record.


Go to step 11</td></tr>
<tr><td>Click on the Cancel button.</td><td>System cancels claim and returns to Claims tab.</td></tr>
</table></td><td></td></tr>
<tr><td>11</td><td><table>
<tr><th>If you …</th><th>Then…</th></tr>
<tr><td>Click on the Yes button.</td><td>System returns to add claims screen.</td></tr>
<tr><td>Click on the No button.</td><td>System returns to Claims tab.</td></tr>
</table></td><td></td></tr>
</table>

View/Search Patient Specific Claims

The system allows the user to search and view all claims for a specific patient by accessing the Claims tab in the Patient screen. To view claims for multiple patients, see View/Search Contract Specific Claims. Users may only search and view claims information for patients enrolled in their program.

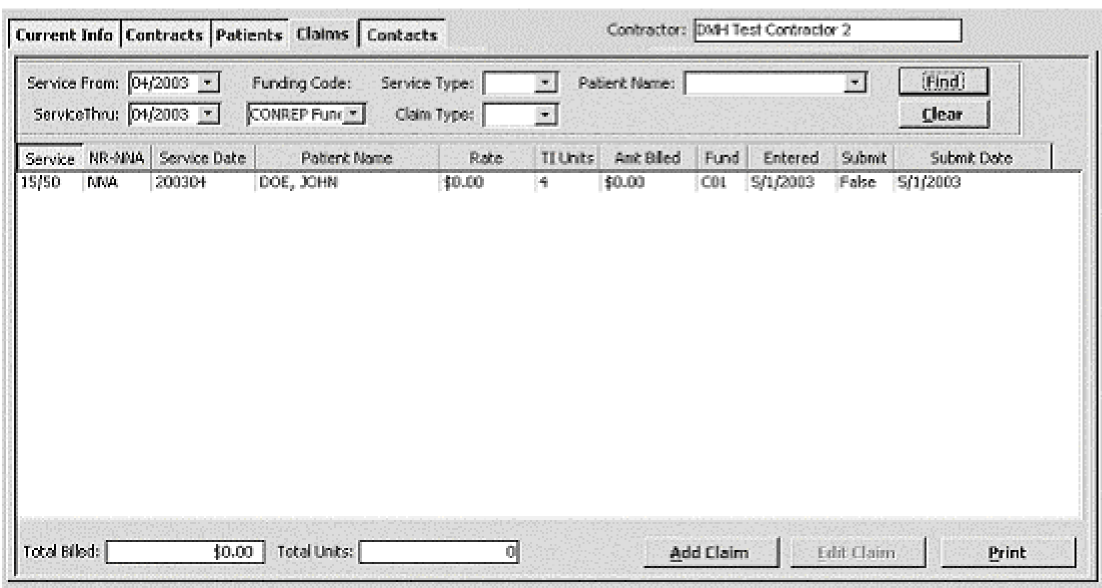


Step	Instruction	System Response
1	Select **patient name**. **Note:** See Search/View Patient Record for further information on Patient Search.	Patient record will display.
2	Select the **Claims** tab.	The Claims screen will appear with all related patient claims displayed.
3	Select desired criteria: **Funding Code** **Service From** **Service Through**	
4	Click on the **Find** button.	The system will display all claim records with specified criteria.

5	Click on column header. 	The system will sort by the header categories in ascending order. **Note:** System will sort by only one category at a time.
6	Click on the **Clear** button.	The system will reset and display all claims for the patient and clear all search criteria.

View/Search Contract Specific Claims

The system allows the user to search and view all claims for either a specific patient or multiple patients by accessing the Claims tab in the Contract screen. Additionally, the user can tailor their search by Service or Claim Type if desired. Users may only search and view claims information for patients enrolled in their program.

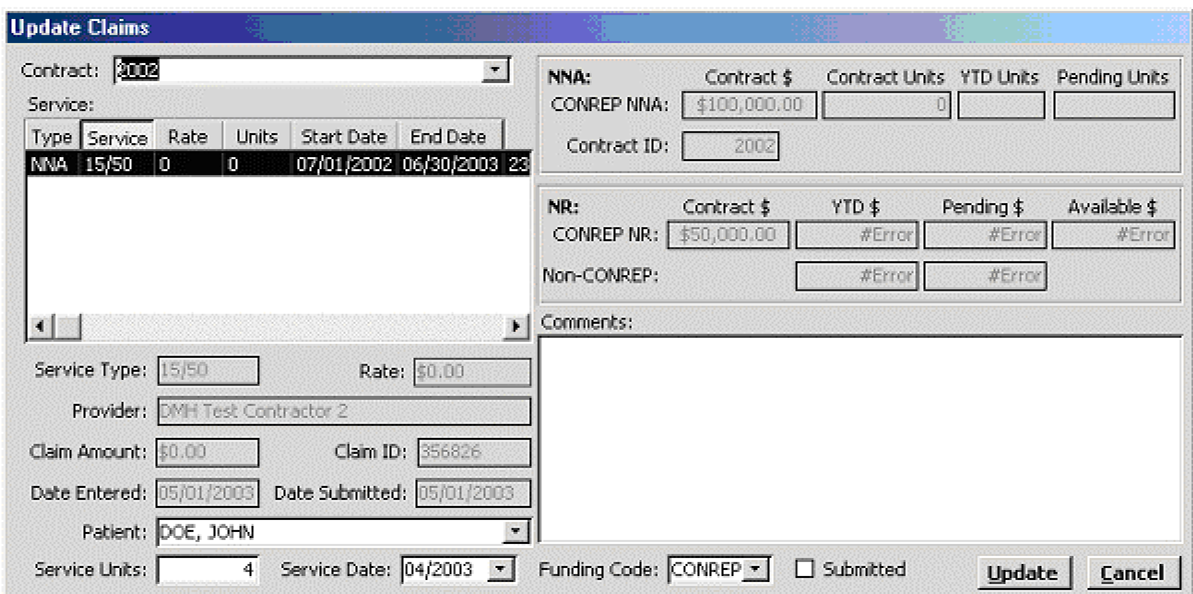


Step	Instruction	System Response
1	Select the desired search criteria. **Note:** The user can select more than one criteria.	
2	Click on the **Find** button.	The system will display all claim records with specified criteria.

3	Click on column header.  	The system will sort by the header categories in ascending order. **Note:** System will sort by only one category at a time.
4	Click on the **Clear** button.	The system will clear all claims information as well as search criteria.

Edit Claims

The system allows the user to edit incorrect claims prior to the monthly submission cut-off date, which occurs by close-of-business on the 15th of every month. To verify claims available for editing, perform a claims search (see View/Search Contract Specific Claims for instructions); claims available for edit have a "Submit" message of "False".



<table>
<tr><th>Step</th><th>Instruction</th><th>System Response</th></tr>
<tr><td>1</td><td>Click on the Contractor button.</td><td>The system will display the Contractor screen.</td></tr>
<tr><td>2</td><td>Select the Claims tab.</td><td>The system will display the Claims screen.</td></tr>
<tr><td>3</td><td>Search for patient claim.

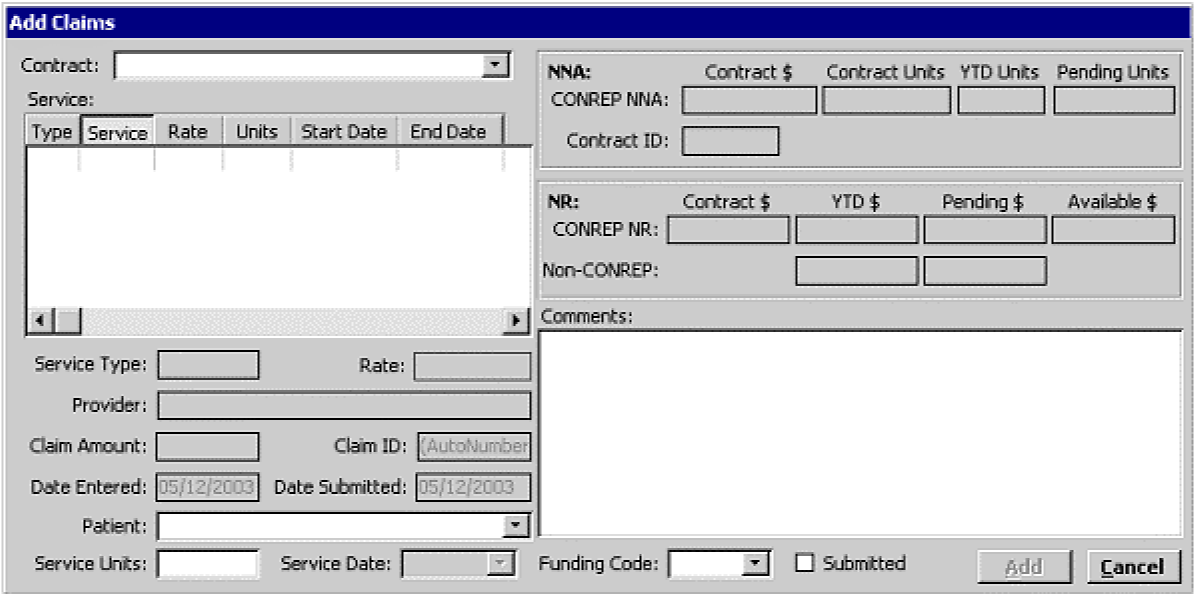
Note: See View/Search Contract Specific Claimsfor further information.</td><td>The system will display patient claims in the list box.</td></tr>
<tr><td>3</td><td>Select the desired patient claim.

Note: Double clicking on the claim will bypass the edit button.</td><td></td></tr>
<tr><td>4</td><td>Click on the Edit button.</td><td>The Update Claims screen will appear.</td></tr>
<tr><td>5</td><td>Select the appropriate FY contract from the Contract drop-down.</td><td></td></tr>
<tr><td>6</td><td>Edit the desired criteria.

Note: One or more criteria may be edited. The user must Tab from the Funding Code field to enable the Update button.</td><td>The system will enable the Update button.</td></tr>
<tr><td>7</td><td><table>
<tr><th>If you …</th><th>Then…</th></tr>
<tr><td>Click on the Update button</td><td>The system will update the claim.</td></tr>
<tr><td>Click on the Cancel button</td><td>The system will not update the claim and will return to the Claims tab</td></tr>
</table></td><td></td></tr>
</table>

Adjusting a Claim

The system allows the user to adjust incorrect claims after the monthly submission cut-off date; previously submitted claims **may not** be edited for correction. To verify claims that must be adjusted, perform a claims search (see View/Search Contract Specific Claims for instructions); claims available for adjustment have a “Submit” message of “True”. To adjust a submitted claim, a new claim must be added that adds, subtracts or nullifies (i.e., deletes) units as submitted on the original claim.



Step	Instruction	System Response
1	Click on the **Contractor** button.	The system will display the Contractor Screen.
2	Select the **Claims** tab.	The System will display the Claims screen.
3	Click on the **Add Claims** button.	The Add Claims screen pop up will appear.
4	Select the fiscal year (FY) from the **Contract** drop-down.	The system will display all the services related to the selected Fiscal Year (FY).
5	Select Service Type from the **Service** List box.	
6	Select a patient name from the **Patient** drop-down.	

<table>
<tr><td>7</td><td>Enter the number of units in the Service Units field and Tab to the next field.

Note: In this field the user will add units, subtract units or cancel out a previously submitted claim.

<table>
<tr><th>If you …</th><th>Then…</th></tr>
<tr><td>Previously submitted a claim with too few units</td><td>Enter the additional number of units to adjust the original claim.</td></tr>
<tr><td>Previously submitted a claim with too many units.</td><td>Enter a negative amount of units to adjust the original claim.</td></tr>
<tr><td>Previously submitted a claim for an incorrect patient, service type, service month, or funding type.</td><td>Enter a negative amount of units to cancel out the claim and then add a new claim to reflect the correct data.</td></tr>
</table>
</td><td></td></tr>
<tr><td>8</td><td>Select a service month from the Service Date drop-down and Tab to the next field.</td><td></td></tr>
<tr><td>9</td><td>Select the funding code from the Funding Code drop-down and Tab to the next field.</td><td>The system will enable the Add button.</td></tr>
<tr><td>10</td><td>Enter the Comments field.

Note: Enter the reason for the adjustment.</td><td></td></tr>
<tr><td>11</td><td>Click on the Add button.</td><td>The system will add the new claim.</td></tr>
</table>

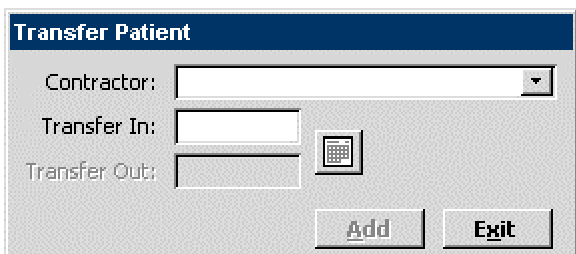
Transferring a Patient

CONREP Providers are required to submit patient transfer information within three business days of such occurrence. A patient transfer will occur when one CONREP Provider assumes supervision and treatment responsibility for another CONREP Providers' patient. The CONREP Provider transferring the patient is responsible for submitting transfer information in the CONREP Data System.

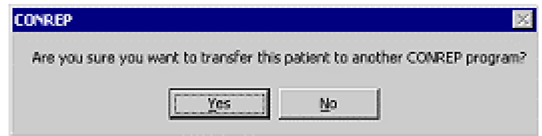
Adding a New Patient Transfer

Patient transfer information must be entered in the CONREP Data System each time a patient separates from and transfers to another CONREP Program. The system allows the user to add Transfer information by first locating the patient record and then clicking on the Transfer tab for the selected patient. If a patient is transferred in error, contact CONREP Operations for further assistance.

Patient transfers may only occur between CONREP Providers. Patients may not be transferred to or from STRP or IMD Providers.



<table>
<tr><th>Step</th><th>Instruction</th><th>System Response</th></tr>
<tr><td>1</td><td>Select the Patient record.
<table><tr><th>If you…</th><th>Then…</th></tr><tr><td>Are going to transfer a patient to another provider</td><td>Go to Step 2</td></tr><tr><td>Just accepted a patient transferred from another provider</td><td>Go to Step 11</td></tr></table></td><td></td></tr>
</table>

<table>
<tr><td>2</td><td>Select the Transfer tab.</td><td>The system will display the Transfer screen.</td></tr>
<tr><td>3</td><td>Click on the New Transfer button</td><td>The system will pop up the following message box.

</td></tr>
<tr><td>4</td><td>Click on the Yes button.</td><td>The system will enable the Transfer Patient pop up screen.</td></tr>
<tr><td>5</td><td>Select a contractor from the Contractor drop-down.</td><td></td></tr>
<tr><td>6</td><td>Click on the Calendar button or type the date in the Transfer In Date field.
<table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Click the Calendar button</td><td>Go to step 7</td></tr><tr><td>Type the date manually</td><td>Skip to step 9</td></tr></table></td><td></td></tr>
<tr><td>7</td><td>Select a date from the From Calendar.</td><td>The “From” date field at the bottom of the calendar screen will be updated.</td></tr>
<tr><td>8</td><td>Click the Return Button.</td><td>The Calendar pop up will close and the Transfer screen will display the selected date in the “Went on Date” drop-down.</td></tr>
<tr><td>9</td><td>Click on the Add button.

Note: Once the transaction is completed, contact the “New” provider so they can input changes to their new patient record.</td><td>The system will transfer the patient information to the new Provider.</td></tr>
<tr><td>10</td><td>Select the Care Level/Waiver tab.</td><td></td></tr>
<tr><td>11</td><td>Click on the Add Care Level Button.

Note: Care Level effective date is the same day as the transfer in date. (Even if the Care Level remains the same, the new provider is still required to add a new Care Level to reflect the change of Contractor. Care Level effective date is the same day as the transfer in date.)</td><td></td></tr>
</table>

12	Select the **Info** tab.	
13	Change the **Residence County**, if applicable. **Note**: Do not change the Admission Date field as this field reflects the CONREP admission date when patient was with the previous CONREP Provider.	

Viewing a Patient Transfer

The system allows the user to view Transfer information by first locating the patient record to be viewed and then clicking on the Transfer tab for the selected patient. Users may only view Transfer information for patients enrolled in their program.

Editing a Patient Transfer

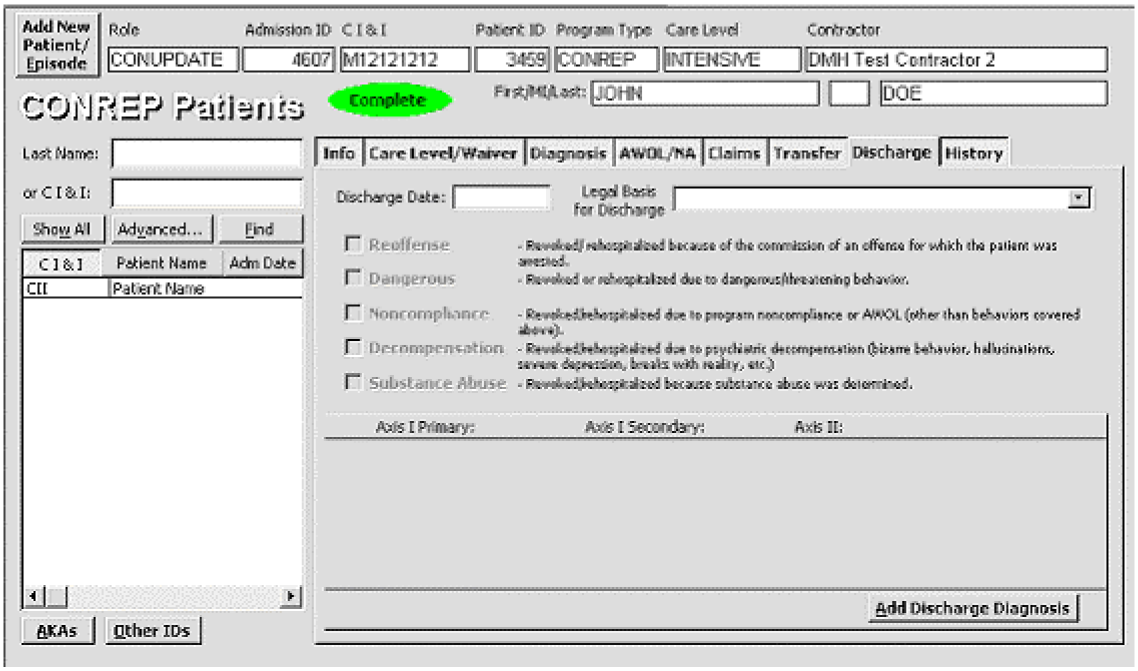
Users must contact CONREP Operations prior to editing any patient Transfer. The system allows the user to edit Transfer information by first locating the patient record to be edited and then clicking on the Transfer tab for the selected patient.

Step	Instruction	System Response
1	Select the patient record.	
2	Select the **Transfer** tab.	The system will display the transfer records.
3	Select the Transfer record to be edited.	

<table>
<tr><td>4</td><td><table>
<tr><th>If …</th><th>Then…</th></tr>
<tr><td>Editing the Contractor field</td><td>Select the correct contractor</td></tr>
<tr><td>The correct transfer in date is beyond the incorrect one</td><td>Key in the correct date</td></tr>
<tr><td>The correct transfer in date is prior to the incorrect one</td><td>System Admin. role needs to delete the transfer record, and a new transfer record should be added</td></tr>
</table></td><td></td></tr>
<tr><td>5</td><td>Click on the Update button.</td><td>The system will update the Transfer record.</td></tr>
</table>

Discharge

Whenever a patient is discharged from a CONREP Program, CONREP Providers are required to submit this status change within three business days of such occurrence.



Discharging a Patient

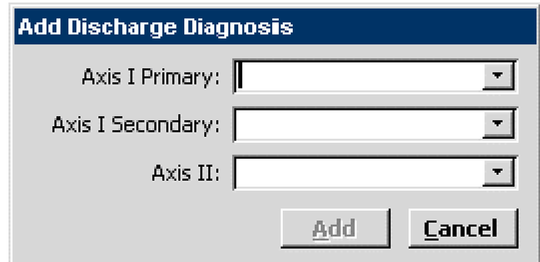
Discharge status information must be entered in the CONREP Data System each time a patient is discharged from a CONREP Program. The system allows the user to add Discharge information by first locating the patient record and then clicking on the Discharge tab for the selected patient.

Contact CONREP Operations if information needs to be edited or updated on a discharged patient record.

Step	Instruction	System Response
1	Select the **Patient** record.	
2	Select the **Discharge** tab.	The following message box will appear. 

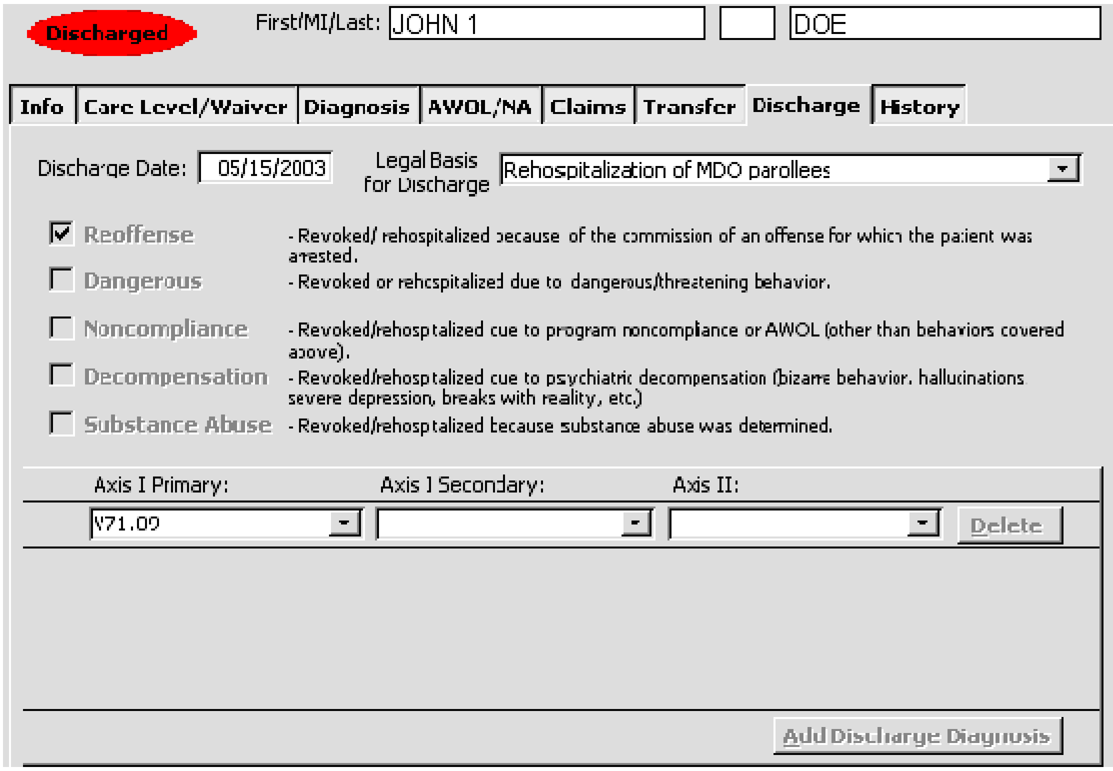
<table>
<tr><td>3</td><td>Click on either the Yes or No button.
<table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Click Yes</td><td>Go to step 4.</td></tr><tr><td>Click No</td><td>The Discharge becomes nullified.</td></tr></table></td><td><table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Click Yes</td><td>The discharge screen will appear</td></tr><tr><td>Click No</td><td>The system will return to the patient record.</td></tr></table></td></tr>
<tr><td>4</td><td>Click on the Calendar button or type in the date for the Discharge Date field.

Note: See the Calendar Wizard section for further information.</td><td></td></tr>
<tr><td>5</td><td>Select a legal basis from the drop-down
<table><tr><th>If the reason for discharge is…</th><th>Then…</th></tr><tr><td>Revocation, Rehospitalization or W&I Code Section 6325B (MDSO)</td><td>Click on one or more of these boxes:
Reoffense
Dangerous
Noncompliance
Decompensation
Substance Abuse</td></tr><tr><td>Not Revocation, Rehospitalization or W&I Code Section 6325B (MDSO)</td><td>Go to Step 6</td></tr></table></td><td></td></tr>
</table>

6	Click on the **Add** button.	The following screen will pop up. 
7	Select a Diagnosis from any of the appropriate drop-downs. **Note**: Axis I Primary Diagnosis must be completed**.**	
8	Click on the **Add** button.	The system will update the discharge. The patient status is automatically updated to Discharged and the Record Indicator will state “Discharged”.

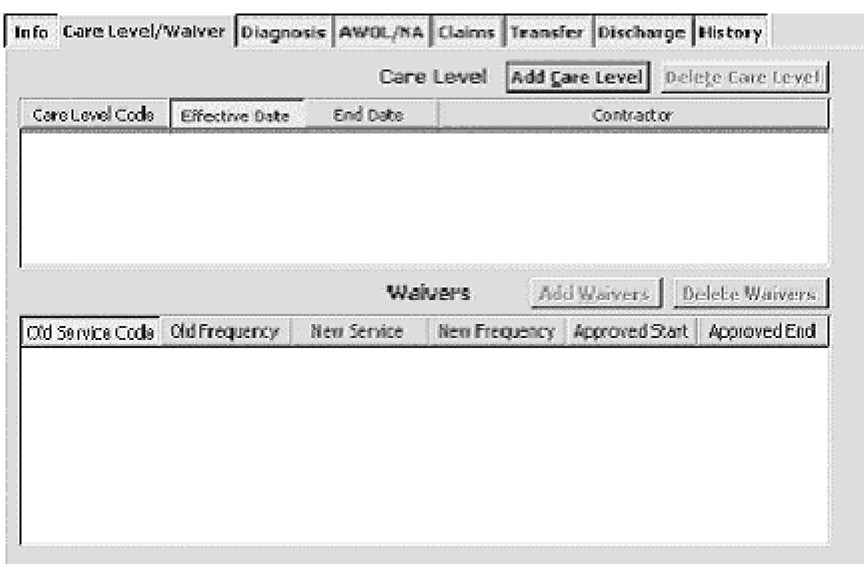
Search /View a Discharged Patient’s Record

The system will allow the user to search and view discharged patient records (see Search/View Patient Records for further information). Users may only search and view discharge records for patients enrolled in their program.



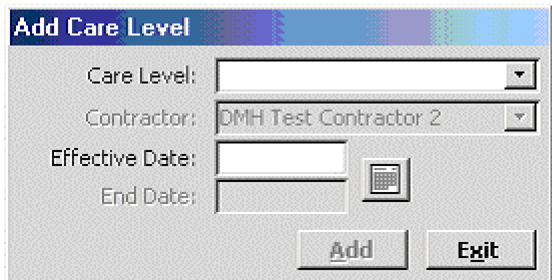
Care Level

All patients are assigned a Care Level upon admission to CONREP based on the CONREP Providers' determination of the required level of treatment and supervision. A patient's care level can change at any time based on their level of functioning while in CONREP.



Add New Care Level

Care Level information must be added for every new patient admission or new episode.



<table>
<tr><th>Step</th><th>Instruction</th><th>System Response</th></tr>
<tr><td>1</td><td>Select the Patient Record.</td><td></td></tr>
<tr><td>2</td><td>Select the Care Level/Waiver tab.</td><td></td></tr>
<tr><td>3</td><td>Click on the Add Care Level button.</td><td>The system will display the Add Care Level window.</td></tr>
<tr><td>4</td><td>Select Care Level from drop-down box:
<table><tr><th>If care level is…</th><th>Then…</th></tr><tr><td>STRP or IMD</td><td>Continue</td></tr><tr><td>Not STRP or IMD</td><td>Skip to Step 6</td></tr></table></td><td><table><tr><th>If care level is…</th><th>Then…</th></tr><tr><td>STRP or IMD</td><td>Contractor drop down box enable</td></tr><tr><td>Not STRP or IMD</td><td>Contractor drop down box is grayed out.</td></tr></table></td></tr>
<tr><td>5</td><td>Select a Contractor from the Contractor drop-down box.

Note: If a patient is moved from one STRP facility to another STRP facility, the CONREP Provider must add a new Care Level and select the new STRP Provider to allow both STRP Providers to submit claims for that patient.</td><td></td></tr>
</table>

6	Click on the Calendar button or type in the date for the **Effective Date** field. **Note:** See the Calendar Wizard section for further information.	
7	Hit the **Tab** Key.	The system will enable the Add button.
8	Click on the **Add** button	The system will add the new Care Level to the Care Level/Waiver tab. The system will also auto-fill an End Date for the previous care level (except Care Level at first admission.)

View Care Level

The system allows the user to view Care Level information by locating the patient record to be viewed and then clicking on the Care Level/Waiver tab for the selected patient. Users may only view Care Level information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Select the **Care Level** tab.	
3	Click on the **Column Header.**	The system will sort the records in ascending order by Column Title.

Edit/Update Care Level

Care Level information may be edited for corrections and must updated as a patient moves between care levels. The system allows the user to edit Care Level information by locating the patient record to be edited and then clicking on the Care Level/Waiver tab for the selected patient. If a Care Level is entered in error, contact CONREP Operations for further assistance.

<table>
<tr><th>Step</th><th>Instruction</th><th>System Response</th></tr>
<tr><td>1</td><td>Go to the Patient Record.</td><td></td></tr>
<tr><td>2</td><td>Go to the Care Level tab.</td><td></td></tr>
<tr><td>3</td><td>Double–click on the Care Level Record to be updated.</td><td>The system will display the Update Care Level screen.</td></tr>
<tr><td>4</td><td><table>
<tr><th>If you Update the…</th><th>Then …</th></tr>
<tr><td>Care Level</td><td>Select a care level from the Care Level drop-down box.</td></tr>
<tr><td>Effective Date</td><td>Click on the Calendar button or type in the date for the Effctive Date field.

Note: See the Calendar Wizard section for further information.</td></tr>
</table></td><td></td></tr>
<tr><td>5</td><td>Click on the Update button.</td><td>The system will update the Care Level record for the patient.</td></tr>
</table>

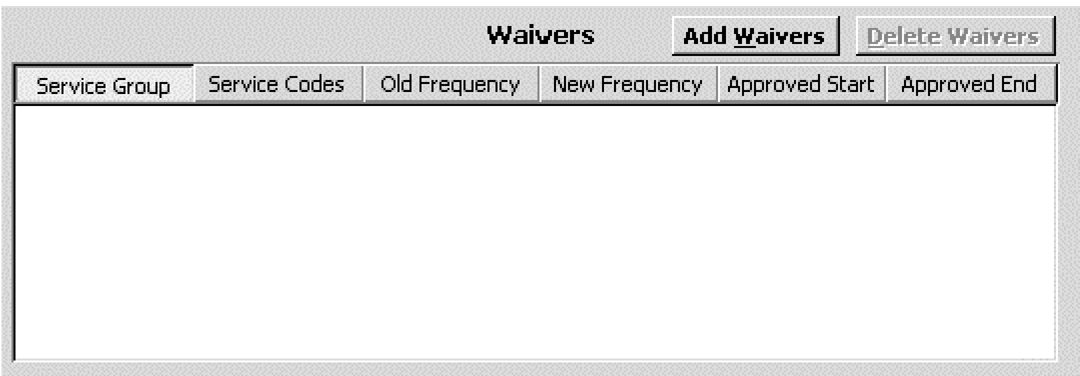
Waivers

A Waiver of Core Service is a process that allows for deviation from core service standards, including substitution of an alternative service, lowering of service frequency or deletion of a service requirement. CONREP Operations sets frequencies in the CONREP Data System for specified patients based on waivers submitted by CONREP Providers that are approved by CONREP Operations

Users will add NNA/Core Service claims, based on approved frequencies and timelines, as entered in the Care Level/Waiver tab by CONREP Operations.

Viewing Waivers

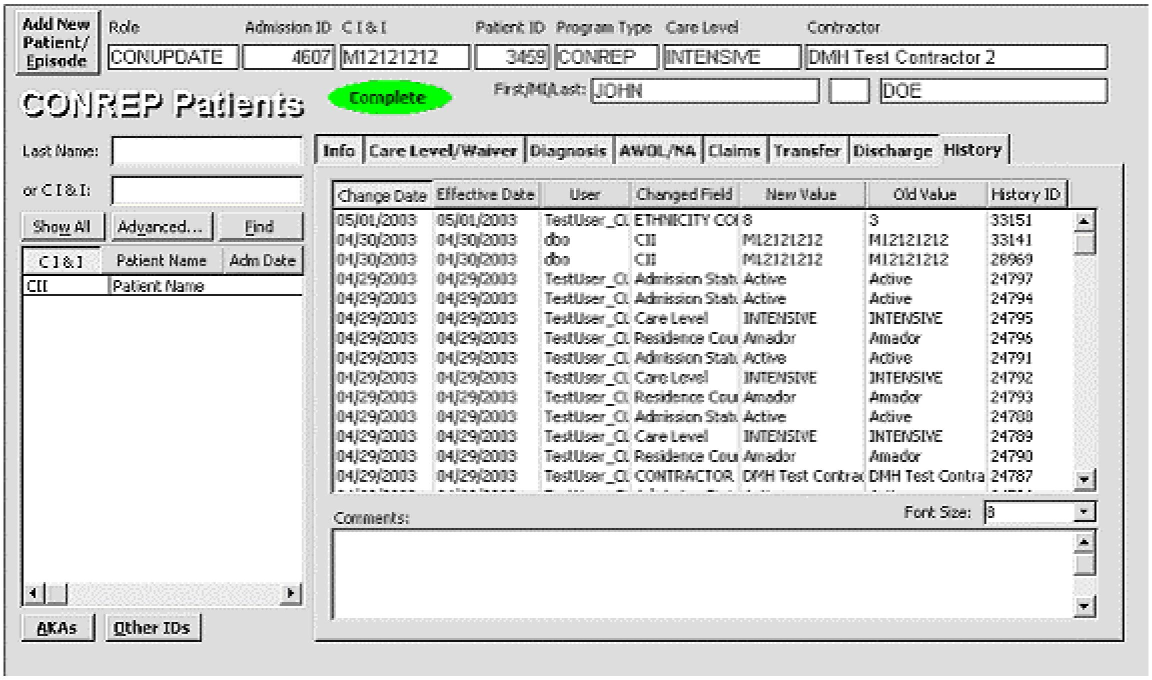
Users may view patient specific Waiver status by accessing the Care Level/Waiver tab. If a Waiver has been denied by CONREP Operations, users will see a "Denied Flag" in the Waiver record. Users may only view Waivers for patients enrolled in their program.



Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Select the **Care Level/Waiver** tab.	
3	Click on **Care Level Record**.	The system will display all waivers related to that care level for the patient.
4	Click on the **Column Headers.**	The system will sort the waivers in ascending order by the Header title.

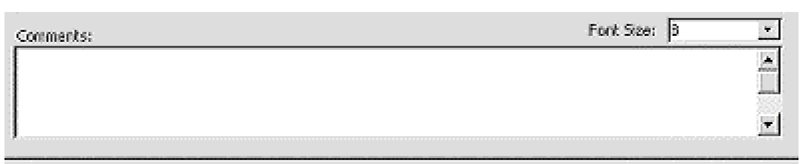
History

The History screen displays specified patient status and demographic information changes and their date of change, which is based on users' data entry updates. The History screen fields are read-only and may not be edited.



Adding Patient History Footnotes

The History screen contains a Comments field that allows users to document the reason for any data entry changes. To add comments to a patient record, first locate the patient record and then click on the History tab and add relevant information.



Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Select the **History** tab.	The system will display the history for the patient's record.
3	Enter comments in the **Comments** field as necessary.	

Viewing Patient History

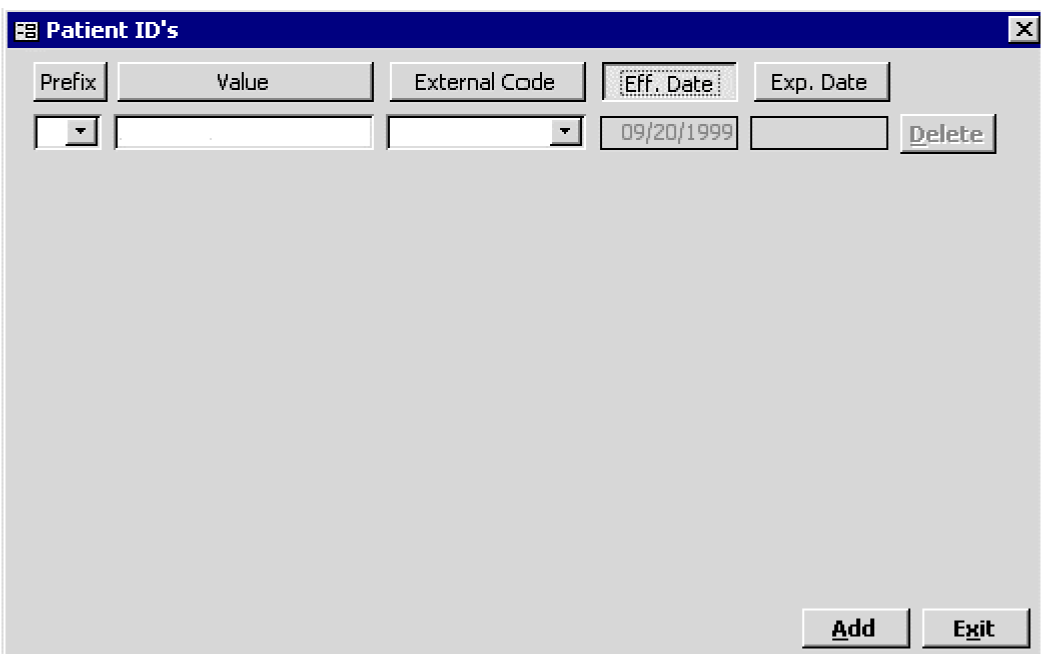
The system allows the user to view patient history information by first locating the patient record to be viewed and then clicking on the History tab for the selected patient. Users may only view History information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Select the **History** tab.	The system will display the history for the patients record.
3	Click on the **Column Headers**.	The system will sort the records in ascending order by Column title.

Other IDs/CI&I

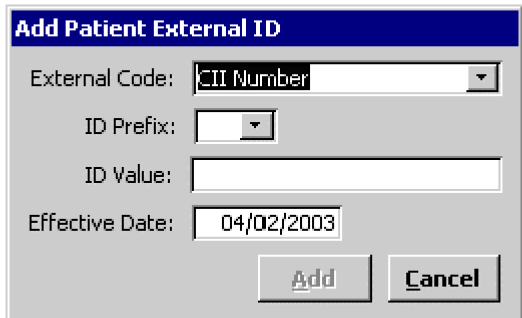
Other ID's is an optional field where users can enter a patient's Social Security number if desired.

Changes to CI&I numbers must be entered in the Other ID field. A CI&I number may be changed by Department of Justice if that patient's CI&I number is purged or the CI&I prefix (i.e., prefixes "M" or "H") is automated.



Add IDs/CI&I

The system allows the user to enter Social Security numbers and CI&I number changes by first locating the patient record and then clicking on the Other IDs button for the selected patient.



Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Click on the **Other IDs** button.	The system will display the Patient ID screen.
3	Click on the **Add** button.	The system will display the Add Patients External ID screen.
4	Select the external code from the **External Code** drop-down box.	
5	Select the ID prefix from the **ID Prefix** drop-down box. **Note:** A prefix must be selected if the External Code is a CI&I number.	
6	Enter ID value in the **ID Value** field. **Note:** CI&I numbers must be 8 digits.	
7	Click on the Calendar button or type in the date for the **Effective Date** field. **Note:** See the Calendar Wizard section for further information.	
8	Click the **Add** button.	The system will update the patient's record.

View IDs/CI&I

The system allows the user to view Other ID's/CI&I information by locating the patient record to be viewed and then clicking on the Other ID's button for the selected patient. Users may only view Other ID's/CI&I information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Click on the **Other IDs** button.	The system will display the Patient ID screen.

Edit IDs/CI&I

The system allows the user to edit Other ID's/CI&I information by locating the patient record to be edited and then clicking on the Other ID's button for the selected patient.

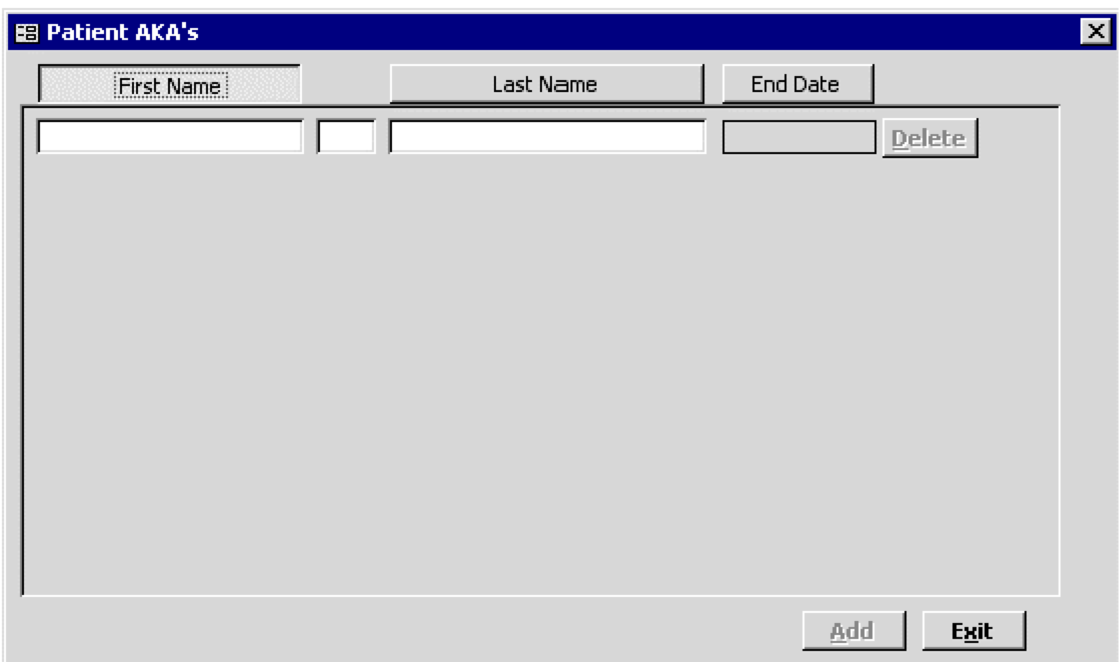
If Other ID's or CI&I numbers are entered in error, contact CONREP Operations for further assistance.

Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Click on the **Other IDs** button.	The system will display the Patient ID screen.
3	Click on the **Add** button.	The system will display the Add Patients External ID screen.
4	Select the external code from the **External Code** drop-down box.	
5	Select the ID prefix from the **ID Prefix** drop-down box **Note:** A prefix must be selected if the External Code is a CI&I number.	
6	Enter ID value in the **ID Value** field. **Note:** CI&I numbers must be 8 digits.	

7	Click on the Calendar button or type in the date for the **Effective Date** field. **Note:** See the Calendar Wizard section for further information.	
8	Click on the **Add** button.	The system will update the patient's record.

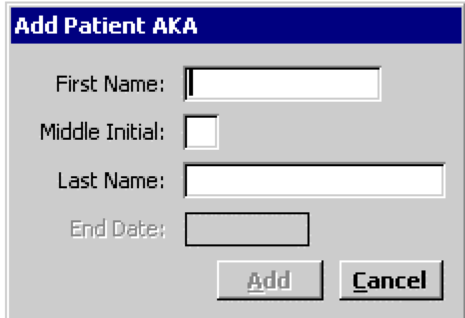
AKA

The acronym AKA (i.e., "also known as") refers to other names that an individual is known by. If a CONREP patient has AKA's, those names will typically appear on that patient's Rap Sheet.



Add AKA

The system allows the user to enter patient AKA names by first locating the patient record and then clicking on the AKAs button for the selected patient. A feature of the AKA function is that the last AKA name entered is the name that will display on the patient record and CONREP Data System reports (e.g., CRP 505 report, etc.). If the user wants to change the name appearing on the CONREP Data system and Reports, another AKA record can be entered with the desired name.



Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Click on the **AKAs** button.	The Patient AKA's screen will appear.
3	Click on the **Add** button.	The Add Patient AKA pop up will appear.
4	Complete the following fields: - **First Name** - **Middle Initial (Optional)** - **Last Name**	
5	Hit the **Tab** key.	The Add button becomes enabled.
6	Click on the **Add** button.	The system will update the patient's AKA.

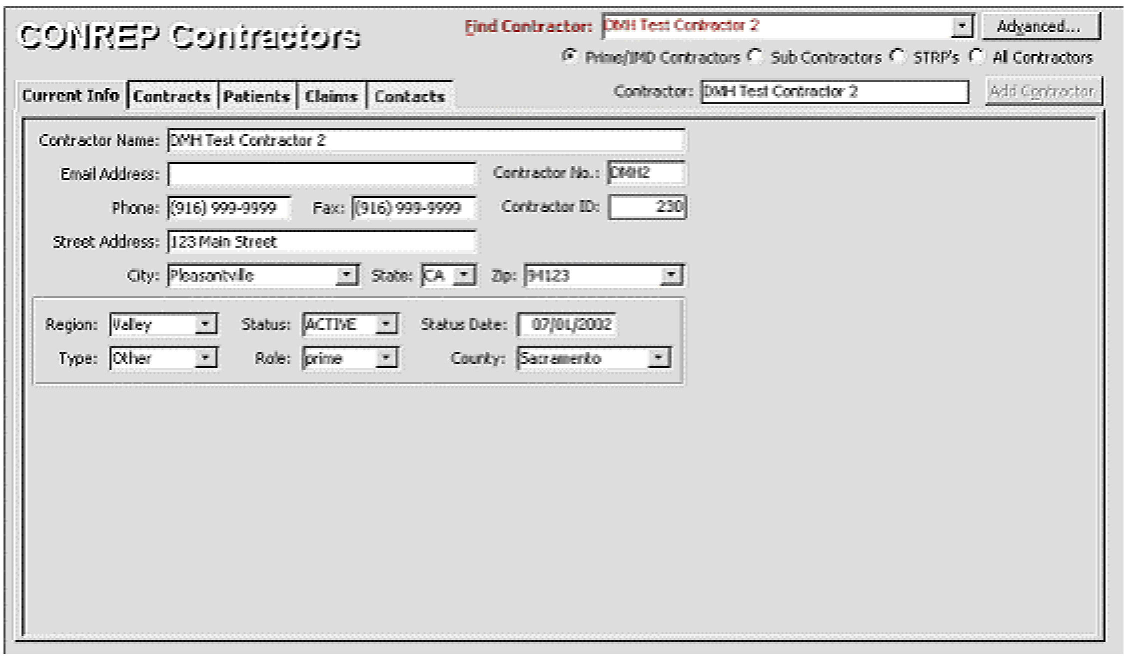
View AKA

The system allows the user to view AKA information by locating the patient record to be viewed and then clicking on the AKA button for the selected patient. Users may only view AKA information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the **Patient Record**.	
2	Click on the **AKAs** button.	The System will display the patient's AKA's screen.

Current Contractor Information

The Current Info tab in the Contractors Screen displays location and contact information for both active and inactive CONREP Providers and their associated subcontractors.



View/Search Current Contractor Information

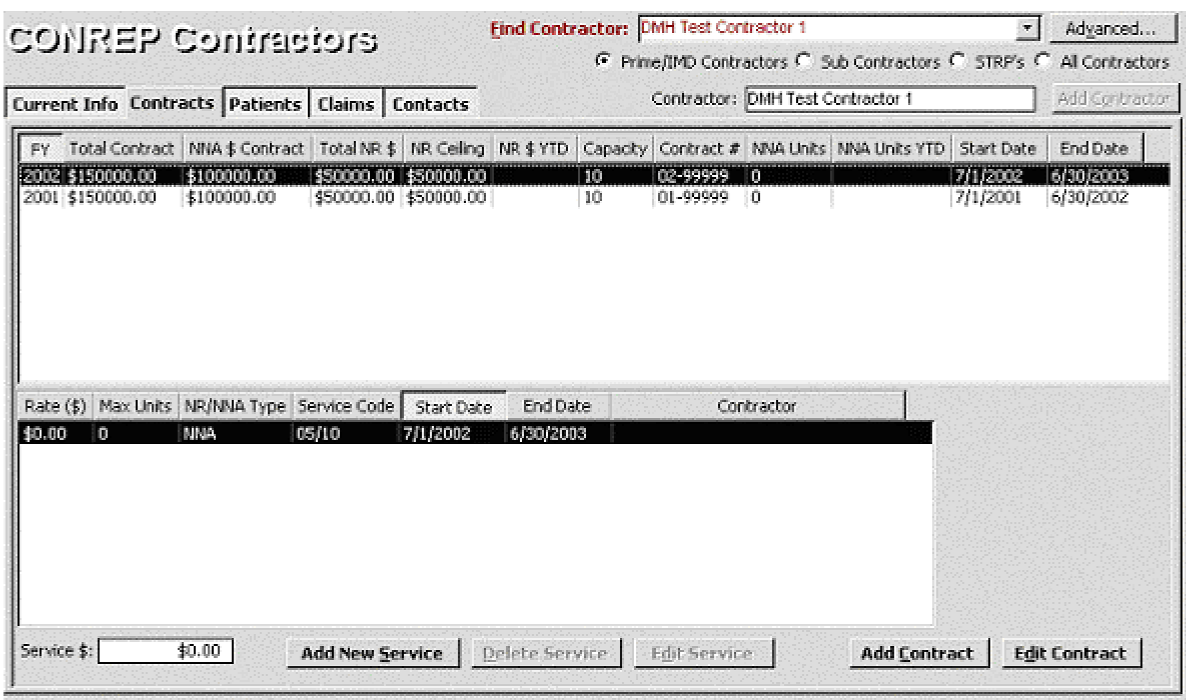
The system allows the user to view contract information by first clicking on the Contracts tab, and then clicking on the selected FY contract to view associated NNA and NR contract services. Users may only view contract information for their program.

Contracts

The Contracts tab in the Contractor screen contains information on all CONREP Provider contracts and their associated NNA and NR services.

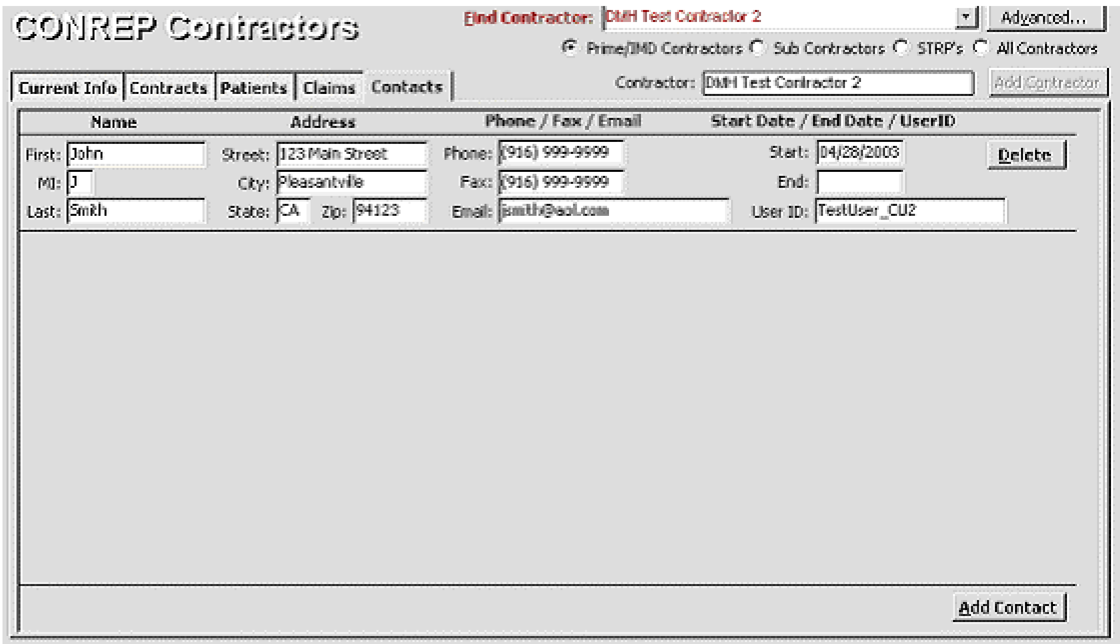
View Contracts

CONREP Providers may view FY contracts by selecting the Contracts tab from the Contractor Screen. Users may only view contract information for their program.



Contacts

The Contacts tab contains key administrative and/or clinical personnel contact information for all current CONREP Providers.

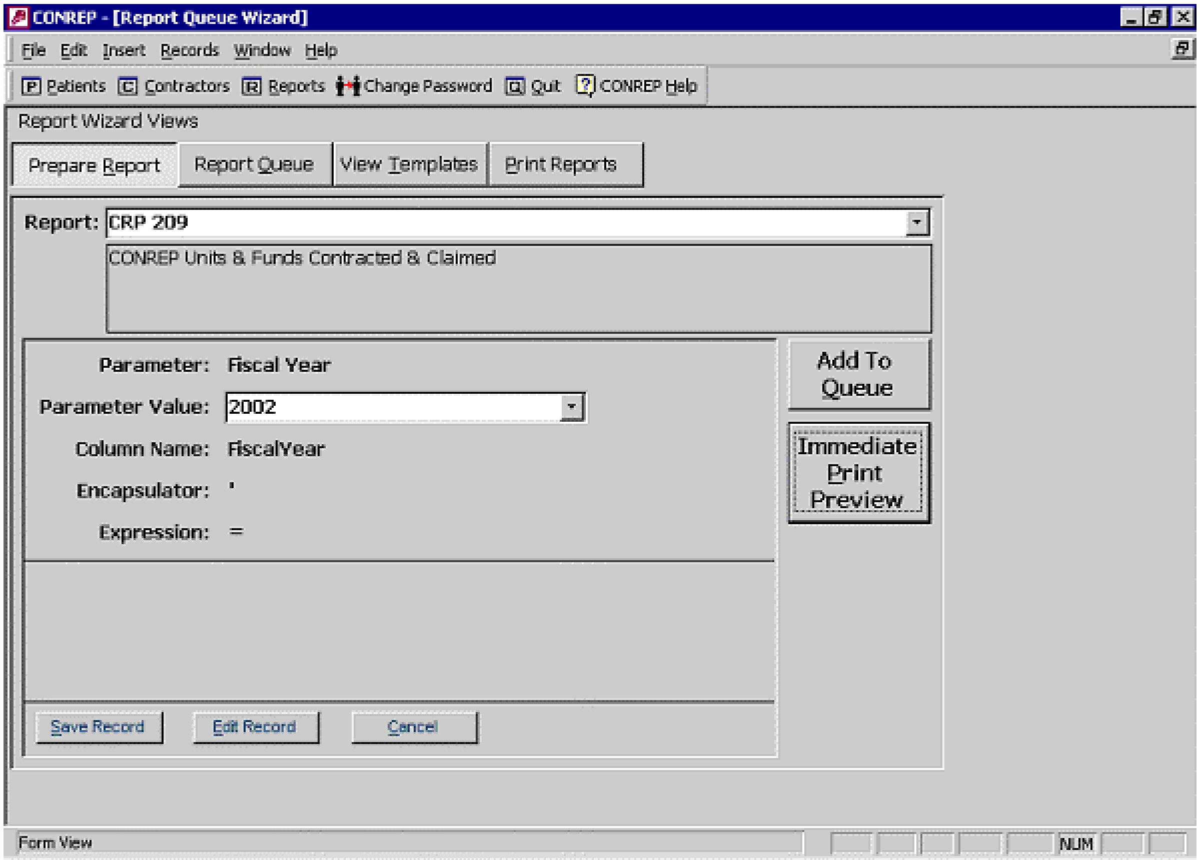


View Contact

CONREP Provider contact information may be viewed by selecting the Contacts tab from the Contractor Screen. Users may only view contact information for their program

Reports

A variety of CONREP Data (CRP) System reports are available for viewing and printing via the Reports Screen. The CRP Reports compile patient and claim data submitted by CONREP Providers and are a means by which CONREP Providers can monitor service utilization and contract compliance. CONREP Providers should print reports monthly on the 16th of the month or the first working day thereafter to monitor for both timeliness and quality of submitted data and to ensure compliance with contract specifications.



Preparing/Printing Reports

The system allows the user to prepare, view and print reports specific to their program by accessing the Reports Screen.

Step	Instruction	System Response
1	Click on the **Reports** Button	The system will display the Reports Screen
2	Click on the **Prepare Report** Button **Note**: The system will default to the Prepare Report Button when opening the Reports Screen	The system will display the Prepare Report screen
3	Click on the **Reports** drop-down	The system will display a report menu
4	Select the desired report	The system will display a parameter and parameter value (if `applicable)

<table>
<tr><td>5</td><td><table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Want to change the Parameter Value</td><td>Go to step 6</td></tr><tr><td>Want to keep the default parameter</td><td>Go to step 8</td></tr></table></td><td></td></tr>
<tr><td>6</td><td>Click on the Edit button</td><td>The system will allow the Parameter Value to be changed</td></tr>
<tr><td>7</td><td>Click on Save Record button

Note: clicking on the cancel button will cancel the previously entered Parameter Value.</td><td>The system will save the new Parameter.</td></tr>
<tr><td>8</td><td>Click on the Immediate Print Preview button

Note: use the navigator to scroll and view report pages.</td><td>The system will display the selected report</td></tr>
<tr><td>9</td><td><table><tr><th>If you …</th><th>Then…</th></tr><tr><td>Click on the Print Icon</td><td>The system will print the selected report in its entirety</td></tr><tr><td>Click on the File menu option and click on the Print Icon</td><td>The system will allow the user to print selected pages of the report</td></tr><tr><td>Click on the Close Report button</td><td>The system will close the selected report and return to the Prepare Report screen</td></tr></table></td><td></td></tr>
</table>

Trouble-Shooting

• **Screen freezes up when performing transaction**	Click on the Esc Key to cancel the transaction and data entry again.